TRACS User Manual

Print Edition (Version 1)

Table of Contents

*In an electronic format, you can **Ctrl-Click** on a topic below to jump to that page.*

Message from the Division and Branch Chiefs

The Wildlife and Sport Fish Restoration Program (WSFR) of the U.S. Fish and Wildlife Service is responsible for administering federal trust fund dollars on behalf of 56 states, territories and the District of Columbia to fund projects and activities related to conservation, wildlife restoration, sport fish, recreational boating, and aquatic education. The Division of Administration and Information Management (AIM) through the Program and Accomplishment Reporting Branch (PAR) is responsible to provide the tools WSFR needs for tracking and communicating the performance of those projects, funded through WSFR's 14 grant programs.

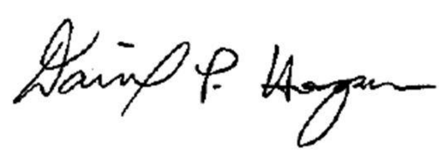
Despite our role in implementing thousands of projects every year, you won't find any shovels, backhoes, or fencing at the PAR Branch headquarters. Our tools are technology and TRACS is the newest and best tool we have. TRACS enables us to track project status, understand project goals, measure project results, and communicate program accomplishments. TRACS makes us more efficient, more effective, more collaborative, more transparent, and more accountable.

When all is said and done, TRACS is still just a tool. It has little value without the projects to which it can be applied. To realize the full promise and potential of TRACS, we are dependent on our partners to collect, input, and report on the information that TRACS manages. The PAR Branch, in turn, makes sure that information is accessible, organized, managed, and reported in a manner that supports our programs and projects. That is the purpose of this user manual - a resource, but also a reminder that TRACS depends on the strength of WSFR's partnership with the states and territories to be successful.

So, thank you for your support and assistance in bringing TRACS to reality. And, thank you in advance for the important contribution you will make in the future. Lastly, thank you for being our partner.

- Steve Barton, Chief, Division of Administration & Information Management, USFWS

- Dan Hogan, Chief, Program and Accomplishment Reporting Branch, USFWS



TRACS Contacts

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Lesson 1: Introduction

What is Wildlife TRACS?

Wildlife Tracking and Reporting Actions for the Conservation of Species (TRACS) is the tracking and reporting system used by the U.S. Fish & Wildlife Service (USFWS), Wildlife and Sport Fish Restoration (WSFR) Program to capture conservation and related actions funded by its grant programs. TRACS provides real-time public access to project information, including project descriptions and accomplishments on the public TRACS Conservation Viewer website.

Core Functions & Features

Map-Based

"Spatial adjacency" refers to the ability to organize and view information both horizontally and vertically. TRACS supports spatial adjacency by attributing data geographically via polygons on a map. Information can be viewed across a landscape (in adjacent spaces, e.g. watersheds, counties, species range, etc.) and nested in multiple vertical views (think "zooming out" with a telescope to take in a broader view). Data can be rolled up to the scale of the view. Project polygons overlap spatially and data layers can be separated vertically.

Cloud-Hosted

The federal and the public sides of the system are hosted in the Amazon Web Services (AWS) "cloud" and both the secure federal back-end and the public front-end are accessed via the Web. Cloud-hosting maximizes data accessibility, while providing secure and stable data systems without the infrastructure and maintenance costs of a traditional data center.

Role-Based Security

State system users access the database through a secure, password-protected portal. State administrators designate task specific roles to users (e.g. one user may only be able to view data; another may be able to edit data based on their assigned "role").

Workflow Efficiencies

- TRACS decreases overall grant administration time and costs for all parties. TRACS saves federal and state staff time and money in five ways:
- Data entry directly into the TRACS portal replaces annual written performance reports, thereby reducing redundancy and duplication in data entry;
- TRACS ensures greater accuracy of data entry by having the originators of the data, not third parties, enter it into the system. This means less time in data quality assurance and quality control.
- TRACS significantly reduces reporting effort by providing on-line access to canned reports as well as tools to develop custom reports.
- TRACS maximizes use of web services to share and ingest data, reducing the time and staff needed to enter and manage project data; and
- TRACS spatial platform makes it easier to identify and communicate project locations, relationships, and outcomes.

Collaboration

Whereas WSFR constitutes the largest single conservation program in the nation, its effectiveness is dependent on the ability to collaborate with state, local, tribal, non-governmental, commercial, and landowner partners. To be successful, WSFR must be able to identify and support project sponsors and implementers. TRACS provides both a forum and a platform for communicating priorities, status, funding and effectiveness of WSFR's contribution towards the nation's conservation efforts.

Data Elements

Projects

TRACS captures information about projects. A Project is user defined to describe one or more related actions undertaken by a group of practitioners to achieve specific goals and objectives. A Project is geospatially represented by a polygon(s) independent of scale. Associated data include fields required by WSFR grant program regulations including: need, objectives, results or benefits expected, approach, and estimated costs.

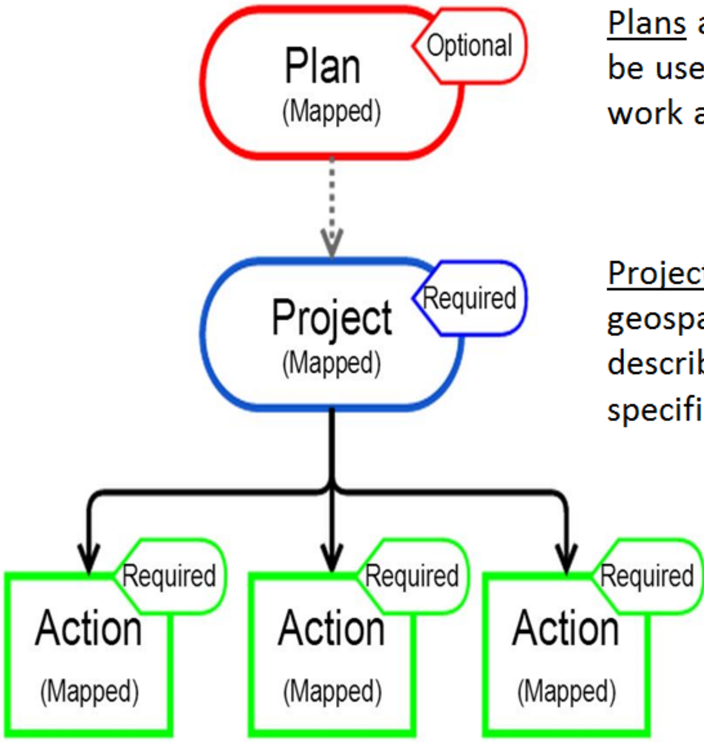
Actions

TRACS captures information about conservation actions. An Action is an intervention undertaken by a project team to reduce threats, capitalize on opportunities, or restore natural species and ecosystems. Actions occur within a Project and are used as the reporting mechanism for grants. An Action is user defined and can be represented spatially by a polygon(s) independent of scale. An action is also described by specific Category, Strategy, and sometimes Activity types.

Plans

TRACS captures information about plans. A Plan is a defined and accepted strategy for achieving specific goals, including conservation of species or habitats within a defined geographic region. It is user defined and could include species management plans, recovery plans, habitat conservation plans, and strategic plans. A Plan is geographically represented by a polygon independent of scale. Plans are optional in TRACS, but they may be helpful to show linkages between work and strategic planning efforts.

TRACS is a **project centric system** and is designed to report grantee conservation efforts as plans, projects and actions.



Plans are optional in TRACS and can be used to show linkages between work and strategic planning efforts.

Projects are user-defined, geospatially represented and describe related actions to achieve specific goals and objectives.

Actions are the actual work done to achieve defined objectives. **Actions are the reporting mechanism for Performance.**

TRACS System Requirements

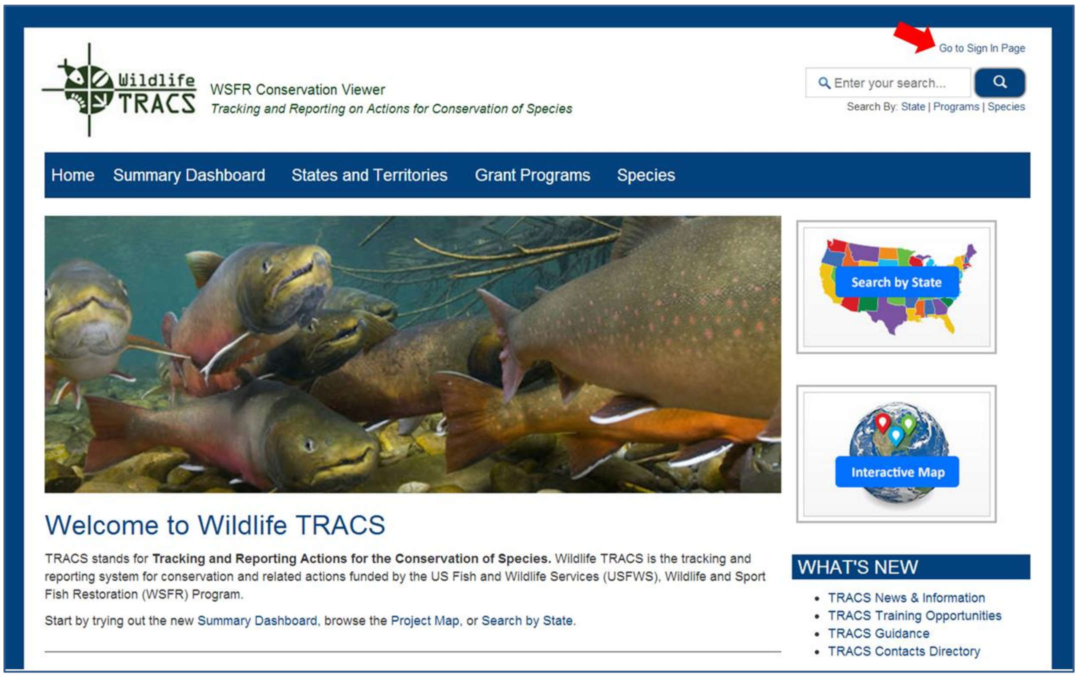
Hardware Type	**Minimum Requirements**	**Recommended**
CPU	Single Core, 2.33GHz or faster x86/x64	Dual Core, 2.67Ghz or faster x86/x64 (i5 or i7+ processor)
RAM	4GB	8GB or greater
Screen Resolution	1024x768	1920x1080 or greater
Other hardware	Mouse or track pad	Scroll Mouse (with scroll wheel and left/right click), Graphics Card (512 MB or higher)

Software Type	**Required Version**
Operating System	Windows 7, 8.1 or Macintosh OS 10.6 or higher. Laptop or desktop only (not currently supported on tablet/iPad or smartphone)
Browser	Internet Explorer 9+ or Google Chrome (current version 38+). Other browsers may work but are not in spec - using another browser is NOT recommended.
Application plug-in	Flash (latest version) Click here for latest version
Productivity Tools	Microsoft Office 2007/2010/2013 or latest and Adobe Reader (PDF)

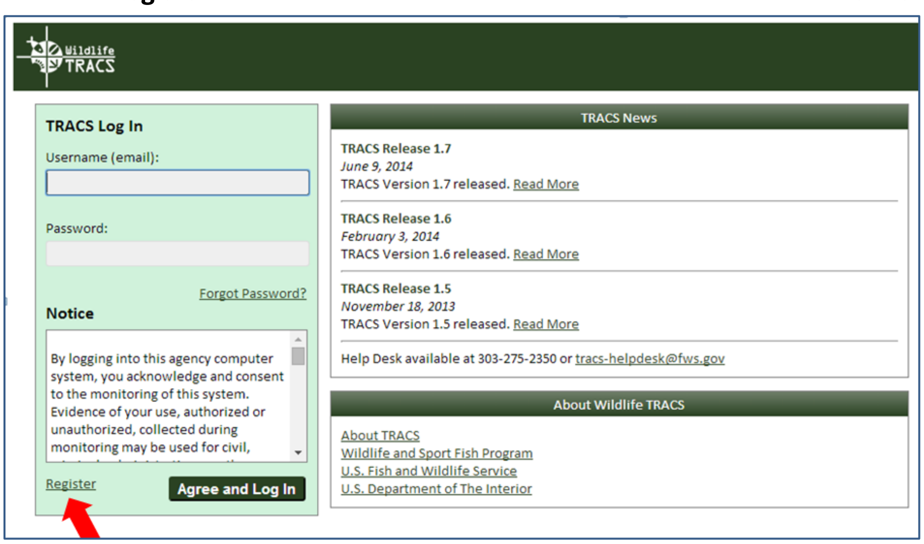
Registration

TRACS has both a live (production) site and a training site, which is a copy of the live site used for training purposes only. Users must register separately for the training site, here: https://tracs.fws.gov/training/data_tracs/dt/dashboard.

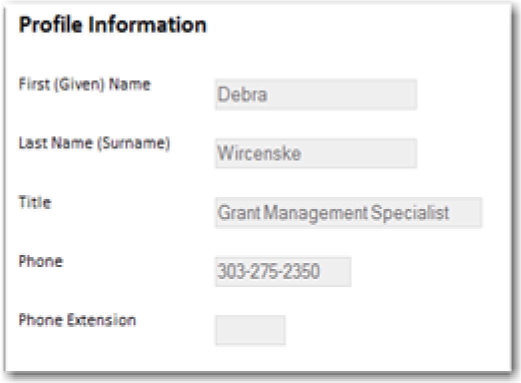
1. To access the live site go to the Public Viewer (**http://tracs.fws.gov**) click the **Go To Sign In Page** link in the middle or top right of the screen.



2. Click the **Register** link located on the left side of the screen under the **Notice.**



3. Complete the **Profile Information** using only your official contact information.



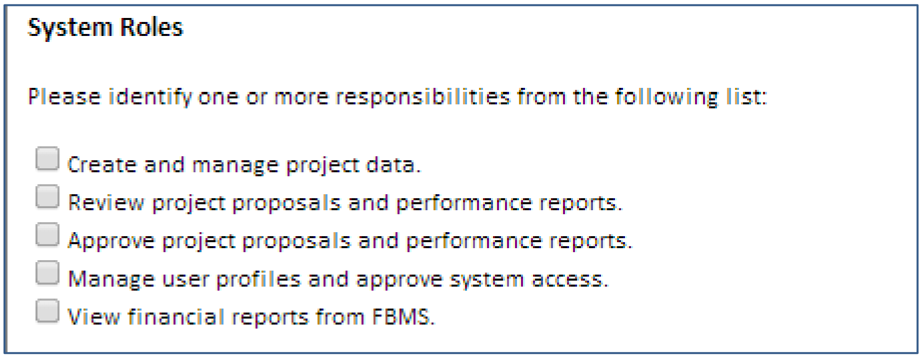
4. Select the appropriate **Agency Type** from the drop down list. (e.g. Federal, Tribal, State). If your agency is not available, email the tracs-helpdesk@fws.gov with a request to add the agency to the system.

5. TRACS uses your e-mail address as your unique username; therefore, if your e-mail address changes you will need to register for a new access account and your old account will be disabled by an agency **User Administrator**.

- Type in your full official e-mail address and confirm
- Create and enter password and confirm

Your password should be a minimum of 12 characters with a combination of lower, upper case and contain one non alphanumeric character, such as: #@. Numeric characters are optional. Passwords should change by at least two characters, and cannot be re-used within 365 calendar days. If you believe your password has been compromised, change your password immediately and report the incident to the TRACS Help Desk at tracs-helpdesk@fws.gov. If a user account name and password are keyed in five (5) consecutive times without correctly accessing the system, the account is automatically locked for 15 minutes as a security precaution.

6. Identify one or more responsibilities from the System Roles list:



7. Click on the **Rules of Behavior for Users of the Wildlife TRACS System** link. Check the **Rules of Behavior** box indicating that you have read and will comply with them.
8. Type the **Verification Code** as shown on your screen. (If you unable to read the verification code select the refresh button located on the right side of the Verification Code to generate a new code.)
9. Click the **Register** button.

- **User Administrators** receive a system generated e-mail with the subject **New TRACS Registration Request Waiting for Your Approval** when the requesting user has successfully completed the registration process.
- Users receive a system generated e-mail with the subject **TRACS Registration Request Approved** when the **User Administrator** successfully approves the TRACS registration.

10. Once a registration request is approved, TRACS users can log into **Wildlife TRACS**.

11. Type in your username which is your official e-mail address and the password that you created. Select the **Agree and Log In** button.

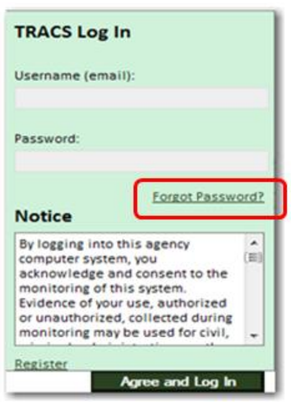
Congratulations you have successfully logged into **Wildlife TRACS**!

Forgot Password

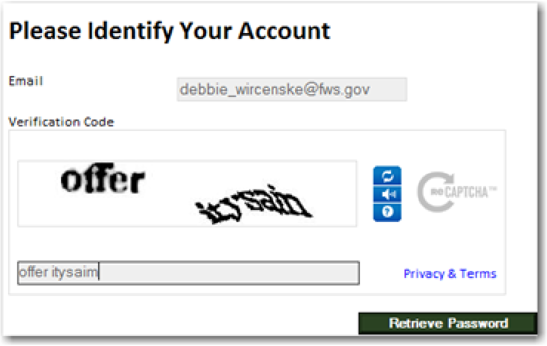
The requirement for passwords is set by DOI policy:

- Policy requires a 15 minute lockout after 5 failed attempts to enter a password. We recommend waiting 20 minutes because the 15 minute lockout period resets if another failed attempt occurs during the lockout period.
- Passwords can only be reset once within a 24 hour period. This requirement can be overridden by modifying the password directly in the database; however, this requires assistance from the Help Desk.
- Passwords must be changed every 60 days and must be unique compared to the previous 24 passwords used. Any change to a password constitutes a unique password (i.e. changing a single character or digit constitutes a new unique password).
- Contact the Help Desk if you are unable to reset your password (such as when the password has already been reset in the last 24 hours).
- If your account has been deactivated by the user administrator, you will need to complete the registration process again.

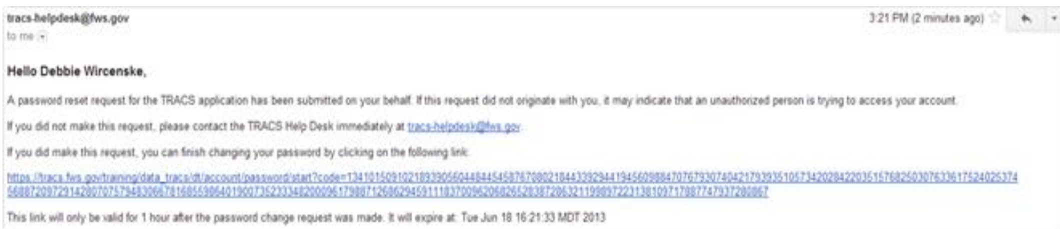
1. Click the **Forgot Password?** link located on the left side of the **TRACS Log in** page under the **Password** field.



2. Fill out the form.
    - Enter your official e-mail address (e.g. **user@stateagency.gov**).
    - Enter the Verification Code.
    - Click the **Retrieve Password** button.
    - TIP: Passwords can only be changed <u>**once**</u> during a 24 hour period as a security precaution.

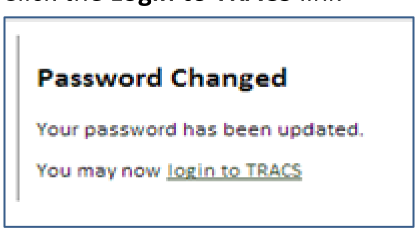


3. You will receive a system generated e-mail via tracs-helpdesk@fws.gov with a link to reset your password. Click the link contained within the system generated e-mail.



4. The link in the e-mail will re-direct you to the **Reset TRACS Password** screen. You will never receive an email to reset your password unless initiated in TRACS. If you receive a password reset email and you did not initiate the reset procedure, contact the **TRACS Help Desk** immediately at tracs-helpdesk@fws.gov.
   - Enter your official e-mail address and confirm.
   - Create and enter your password and confirm.
   - Type the Verification Code.
   - Click the **Change Password** button.

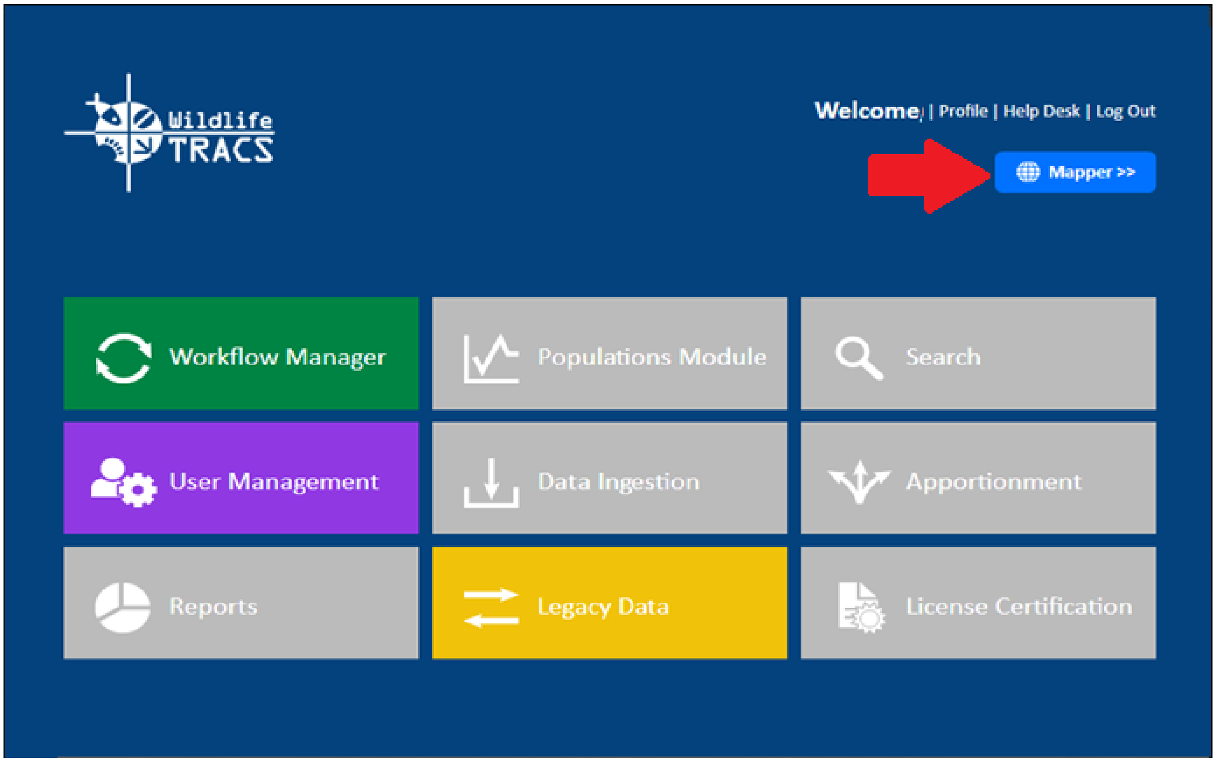
5. A system generated notification that your password has been successfully changed will be sent to the user email address.
6. Click the **Login to TRACS** link



7. You will be re-directed to the **TRACS Log In** screen. Type in your username which is your e-mail address and your new password. Click the **Agree and Log In** button.

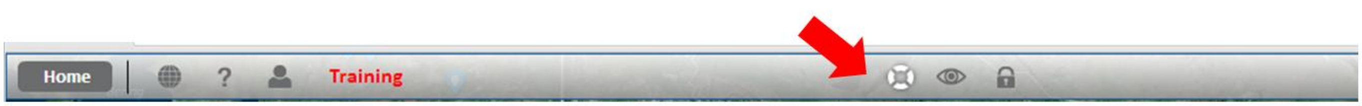
Lesson 2: Mapping your Project

1. Select the **Mapper** button on the **TRACS Dashboard**.

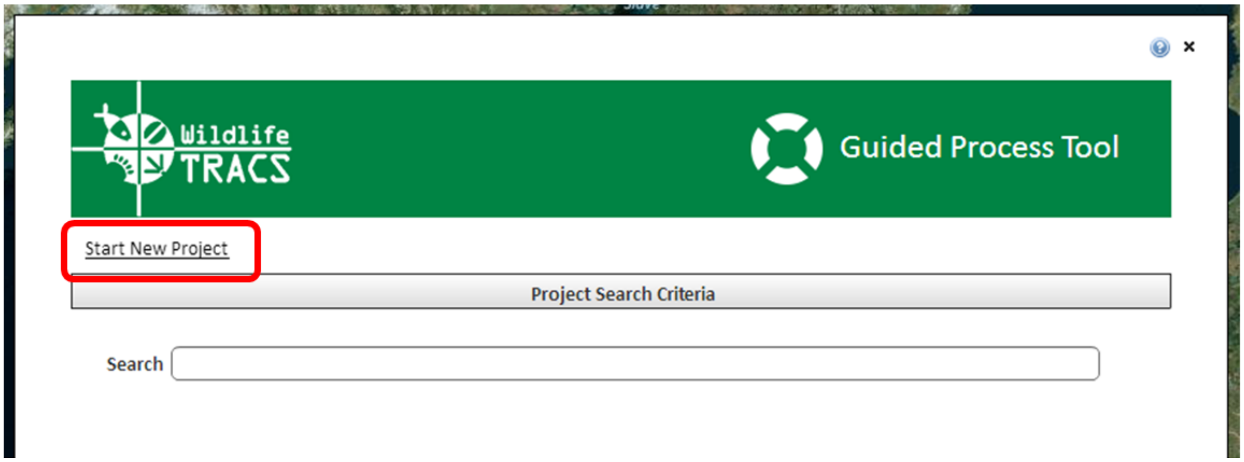


2. Navigate the map to a desired geographical location using the **Navigation Tool**. Be sure the mapper is zoomed in or zoomed out enough to enable an accurate representation of the entire project area.

3. Select the **Guided Process Tool** from the **Mapper Toolbar** (top of screen).



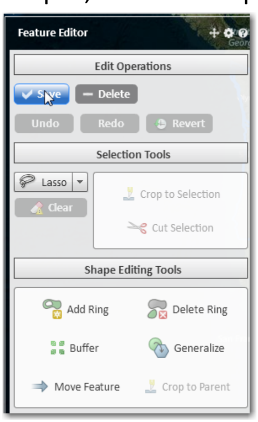
4. Click **Start New Project** link.



4. Select the appropriate drawing tool and create the project boundary (project boundary displays in blue).

- The **Freehand Polygon** allows end-users to capture specific location areas which are contoured, e.g., habitat area, forested area. Freehand Polygon is created by holding down the left mouse button and moving the cursor until the desired polygon is visible and then releasing the left mouse button.
- **The Geometric Polygon** allows end-users to capture specific location areas which are linear (point-to-point). Geometric Polygon areas are created by left clicking the mouse of the map to a single vertex. Continue clicking the left mouse button at each vertex of change in direction until the desired polygon is visible. Double click the left mouse button to complete the feature.
- **The Geopicker tool** is used to select a shared shape from a reference layer. The tool allows end-users to capture specific location areas which have pre-determined boundary types (Political, Hydrological, Coastal or Alaska). Use this tool if a plan and project is Statewide or for a specific County.
- The **Import Shapefile tool** is used to import a shapefile from a local source. A shape file contains spatial features which represent a specific type of location. e.g., rivers and lakes. The shapefile import tool accepts all local coordinate systems (NAD27, NAD83, WGS84) and translates the shape into the flat webmercator display. The import tool requires a zip file that contains standard shape file extensions.

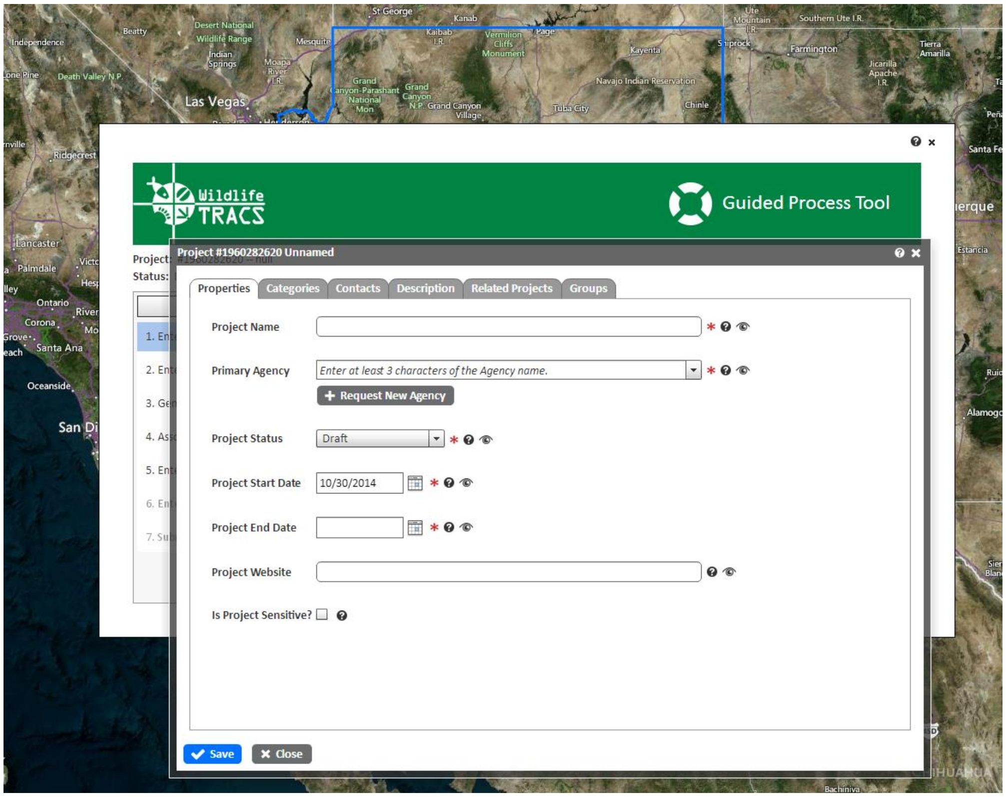
5. Select the **Save** button located on the **Feature Editor**. For more tips on creating, replacing or editing shapes, visit the Shape Creation and Editing page.



6. The **Project** is automatically assigned a system generated ID number. The **Feature Editor** is displayed on the **Mapper**. Select the one of the feature drawing or selection tools for a project to create the project area or polygon.

7. After a project polygon or shape has been created and saved, the Guided Process Tool will re-open

and the **Project Properties Form** will display to begin entering project information.



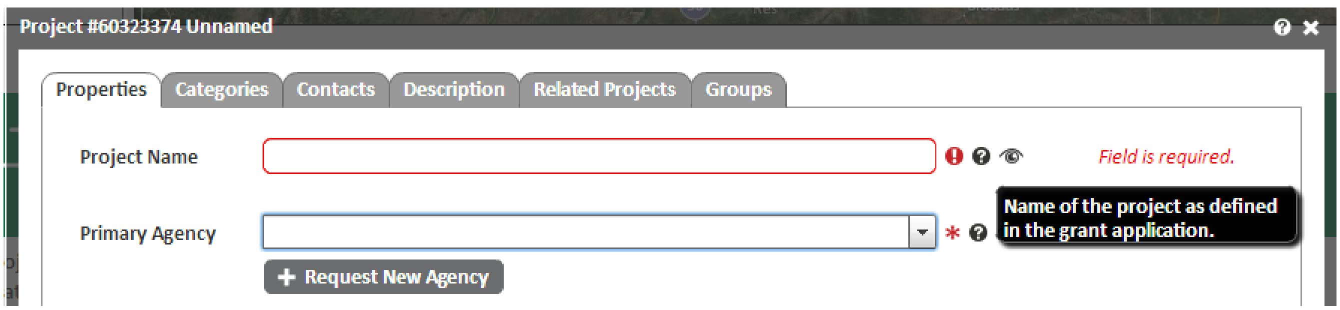
Lesson 3: Defining your Project Properties

Important Icons:

Red asterix or red exclamation point display by required fields (box around field will also appear in red if status is Active)

Hover over the question mark icon to view information about that field

The eye icon indicates field will be displayed on Public reports (some fields may be limited or not displayed if sensitive box is checked)



Properties tab

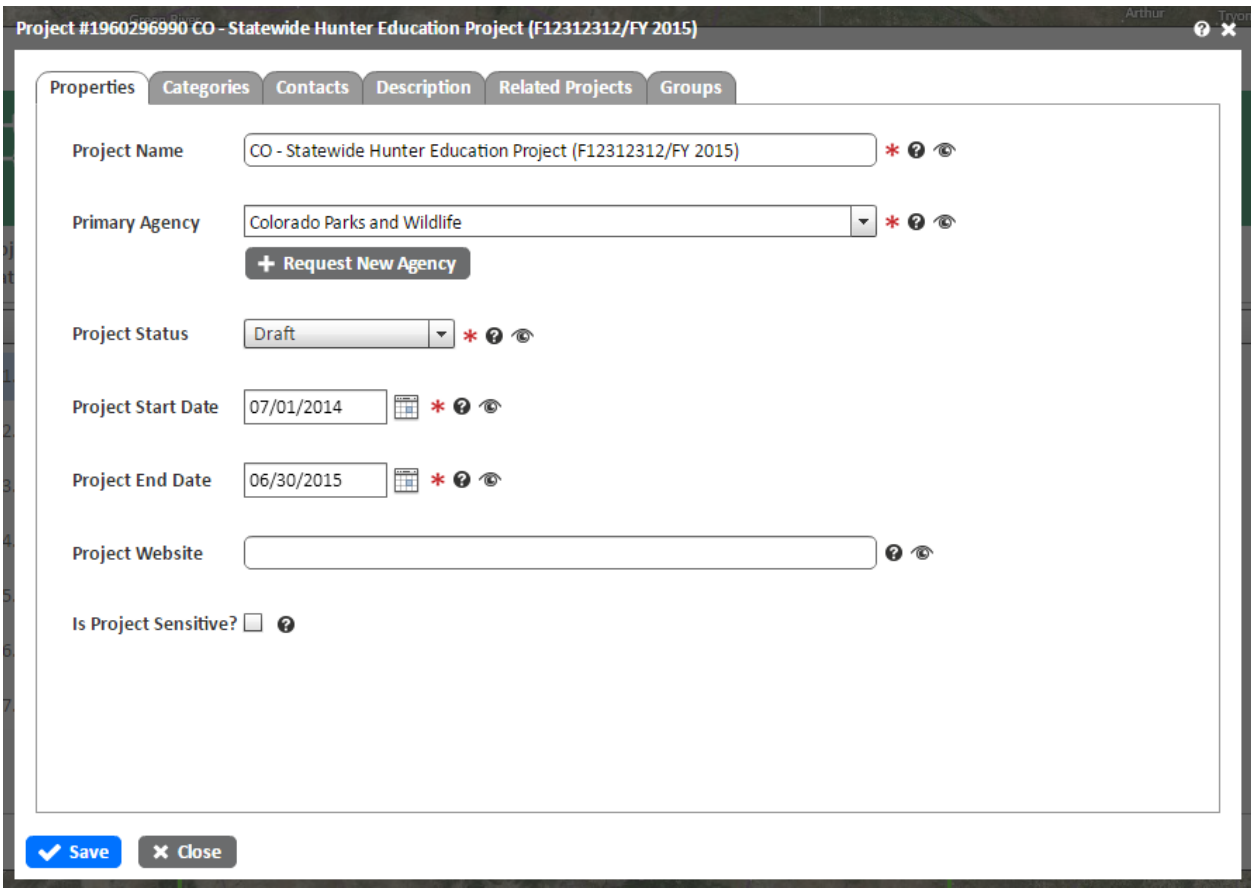
1. Enter the **Project Name** (e.g. NV - Hunter Education Project)
   - For consistency in style, particularly on the Public Viewer, there is a recommended Project naming convention. At a minimum, a two letter State abbreviation followed by a hyphen and a short, descriptive title is required. Other optional identifiers that can follow in parentheses include FBMS number, FAIMS grant number and year. It is understood that not all Projects are in a single State (e.g., competitive State Wildlife Grants, multistate projects), so substitutions for the State abbreviation can be used for these use cases.
   - **State Abbreviation - Descriptive Title (optional FBMS/FAIMS/Year identifiers) valid examples:**
     - **CA - Upper Butte Basin Wildlife Area (F13AF00345/W-54-D/2013)**
     - **CA - Grizzly Island Wildlife Area (F13AF01314)**
     - **NV - Sage Grouse Research 2014**

2. Select the **Primary Agency** from the drop down list by typing at least three letters of the agency name into the predictive search box. TRACS returns a set of options to choose from that matches your input.

3. Select the **Project Status** (e.g. Draft, Active, Completed). The Draft status is used initially and allows you to save the form at any time. All field validation requirements must be satisfied for Projects with an "Active" or "Completed" Project Status before the Save button

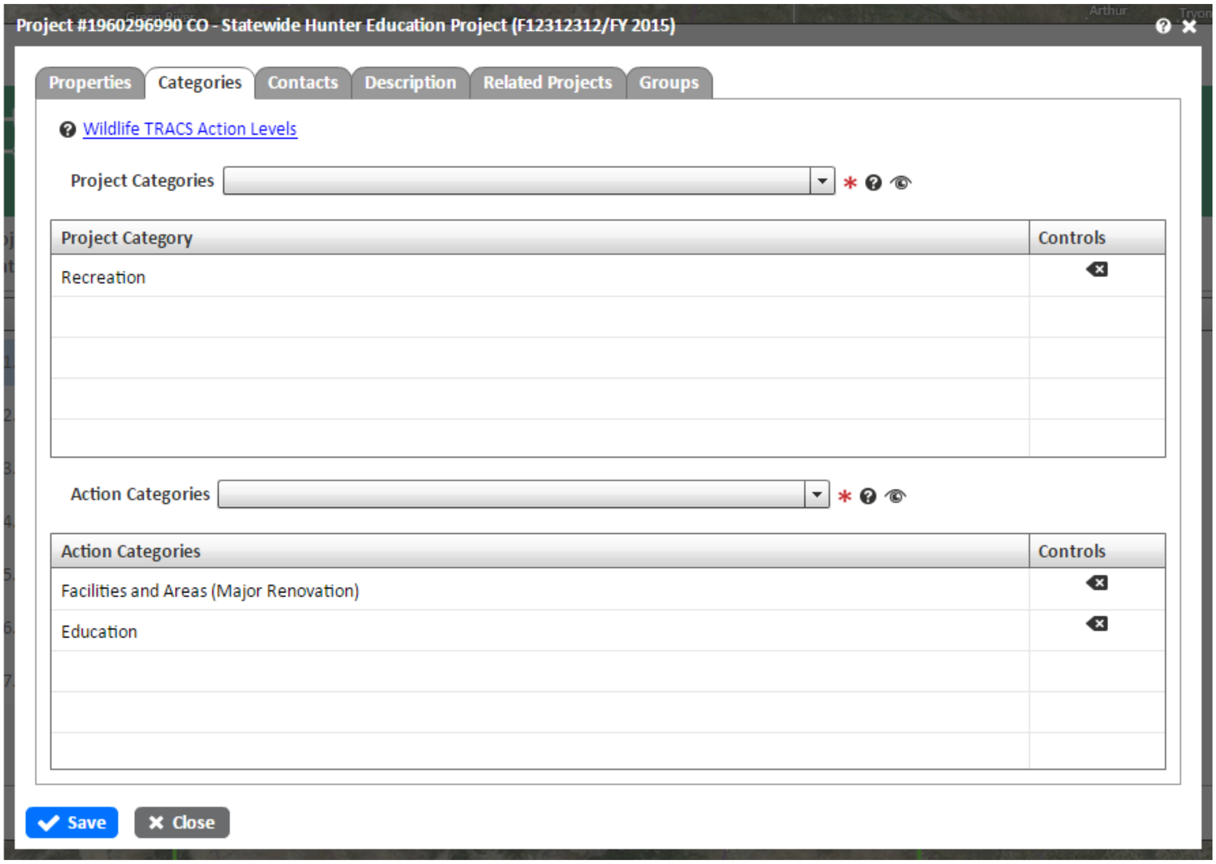
activates. Projects with a "Draft" status can be saved at any time; however, workflow operations are not available for Projects in "Draft" status.

4. Select the **Project Start Date** and **Project End Date**.
5. Enter the address of an external **Project Website**, if applicable.
6. If the project is considered **sensitive** (i.e. related to a listed species, private landowner, or land acquisition), check the **Is Project Sensitive?** checkbox. The spatial boundary of a sensitive project is automatically buffered so the exact location of the project is hidden on public reports (the location is buffered to show the county or state polygon).



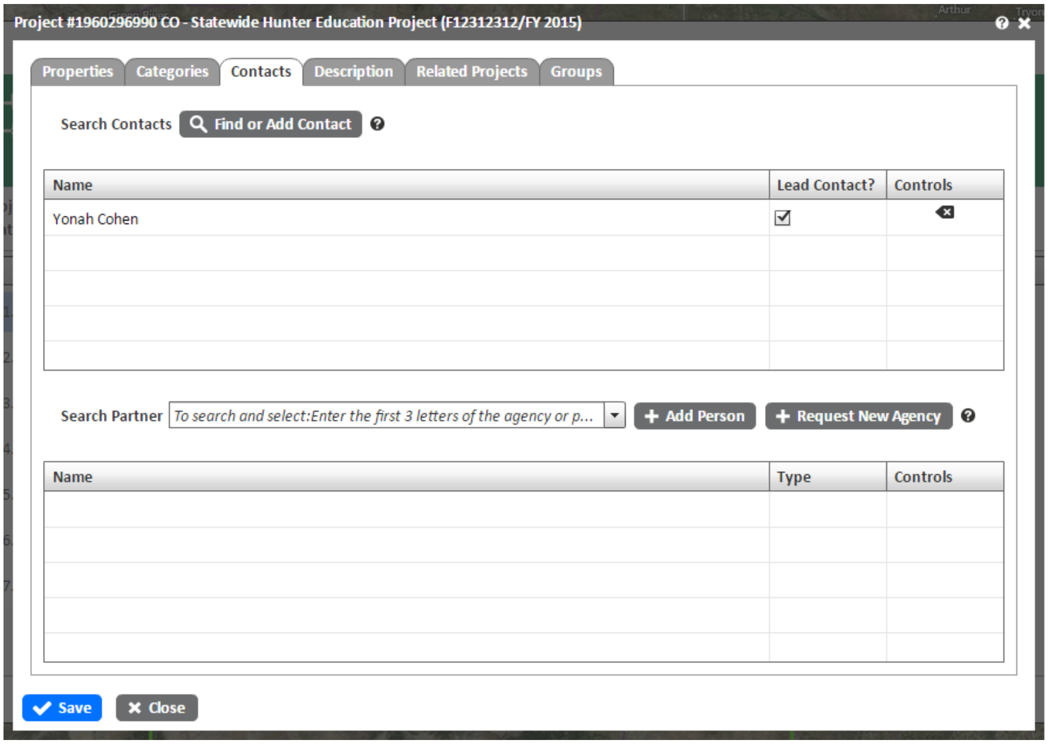
Categories tab

7. Select one or more **Project Categories** from the drop down list (e.g. Conservation/Management).
8. Select one or more **Action Categories** from the drop down list (e.g. Data Collection and Analysis). The **Action Categories** you select determine the objective and action types available later.



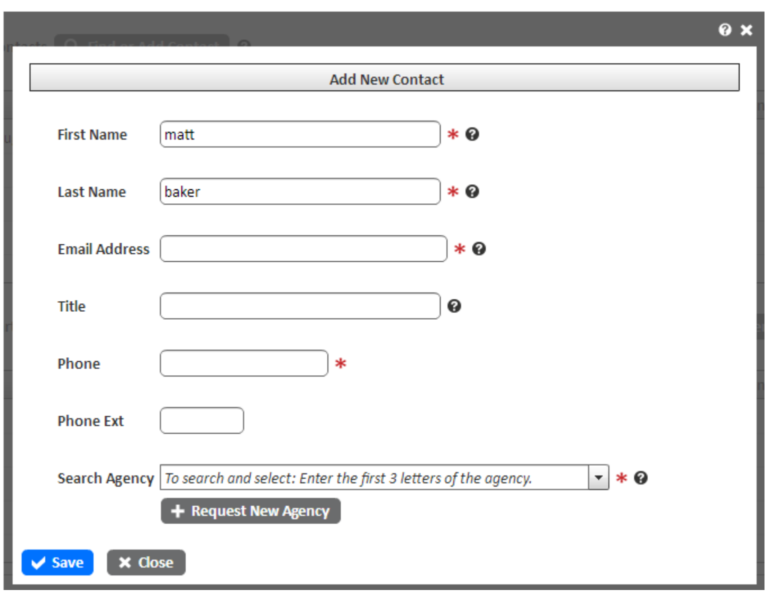
Contacts tab

9. Select the **Find or Add Contact** button to add the grant contact(s) such as the federal aid coordinator for your agency (later on there is a field to enter the principal investigator for the project).
10. Enter the search parameters, **First and Last Name** or **Email Address**
11. Click the **Search** button. If no matches are found select the **Add New Contact** button. Refer to Adding New Contact section below.
12. Mark the check box for the **Lead Contact** (even if there is only one contact)
13. Select the **Search Partner** drop down list if applicable (i.e. Department of Marine and Wildlife Resources).
14. If no matches are found click the **Add Person** button or **Request New Agency** button.



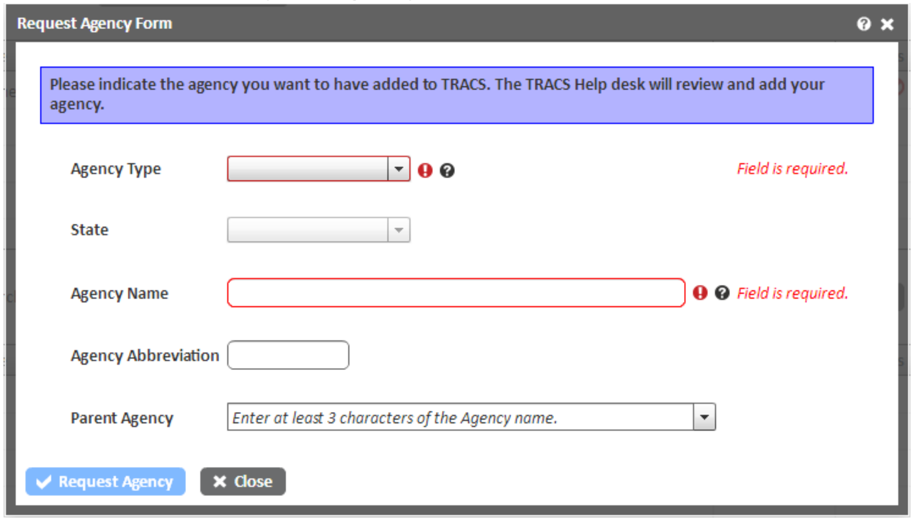
Adding New Contact

- Enter **First and Last Name**, **Title, Phone and Email Address**. (Required fields)
- Enter the first three letters of the agency name into the **Search Agency** predictive search box.
- Select the contact **Agency** from the drop down list.
- Select the **Save** button.



Adding a new Agency

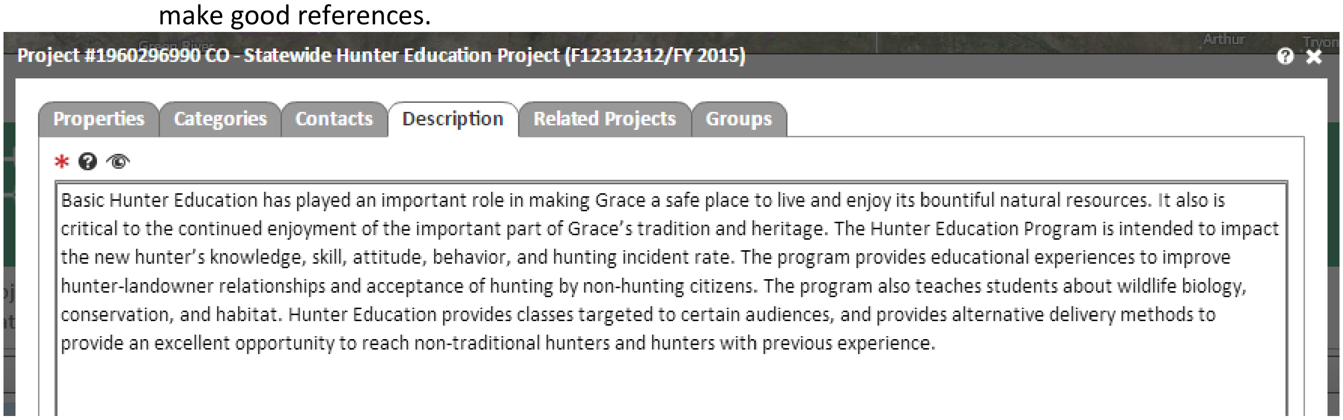
- Select the **Agency Type** from the drop down list (e.g. Federal, State, Tribal, Local, or NGO).
- Select the **State** from the drop down list (if applicable).
- Enter the **Agency Name** (e.g. Arizona Mollusk Natural Resources).
- Enter **Agency Abbreviation and Description** (optional).
- Enter the first three letters of the agency name into the **Parent Agency** predictive search box.
- Select the **Parent Agency** from the drop down list.
- Select the **Request Agency** button.



Description Tab

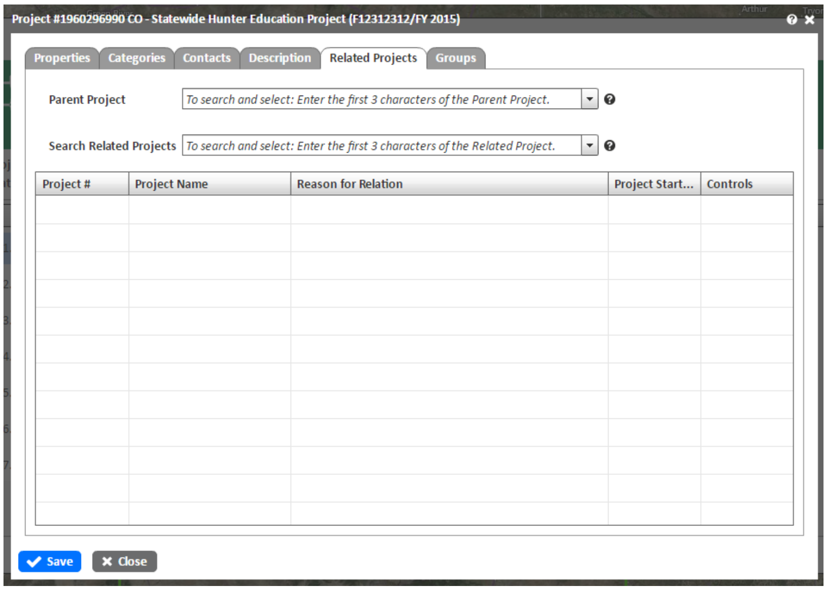
15. Enter or perform a copy and paste into the **Public Description** text box.

    - Use the **Ctrl+C** and **Ctrl+V** commands or the mouse right-click menu to perform a copy and paste from another document source. Fix formatting if needed.
    - The information entered under the **Public Description** will be visible to the public and should be written as an abstract using common terms and language that is free of acronyms or jargon. Components from the Need section and Expected Results section make good references.



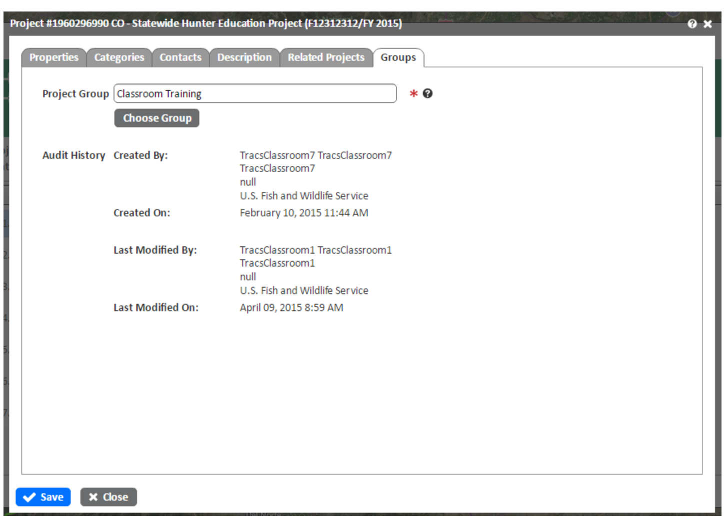
Related Projects Tab (optional)

16. Enter the first three letters of the project name into the **Parent Project** or **Related Project** predictive search box.
17. Select a **Parent Project** or **Search Related Projects** from the drop down lists.
18. The **Reason for Relation** and **Project Start** fields should describe the reason for creating a relationship between projects.
19. Click the **Save** and **Close** buttons.



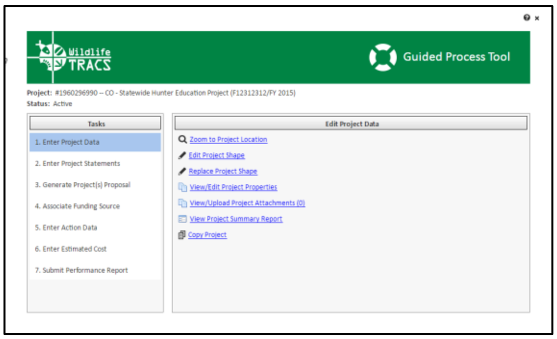
Groups Tab

20. The **Project Group** list only contains the groups to which you have edit permission in TRACS. If you only participate in a single group, no other options will be available.
21. Select a Project Group from the drop down menu. (Click the plus sign to expand the selection).
    - Tip: The Group Tab also displays the audit history for the project.



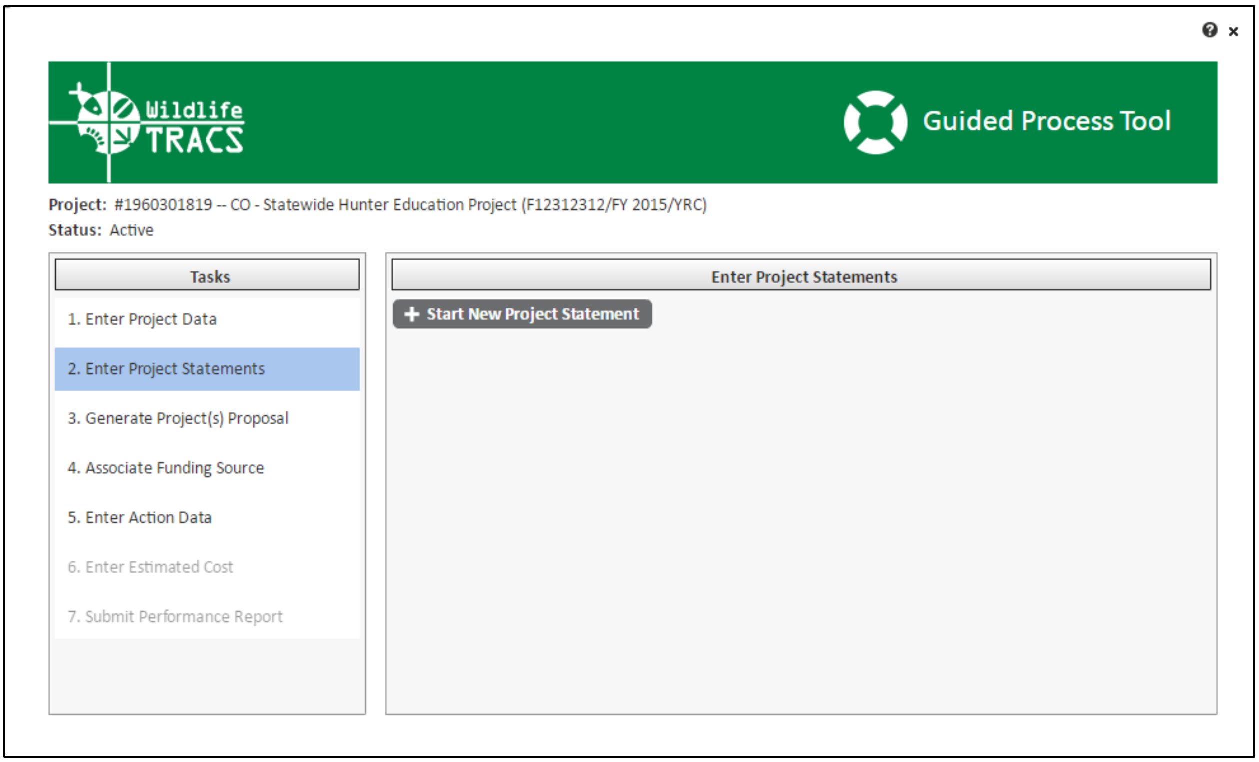
Save and Close

22. Select the **Save** button.
23. The “Project Successfully Saved” window opens. Select the **OK** button.
24. Select the **Close** button to close the project form.
25. You will be directed back to the **Guided Process Tool**. Use the links on the right side to view or edit the project information.



Lesson 4: Entering Project Statements

1. From the Guided Process Tool, select **2. Enter Project Statements** from the Tasks panel and click **Start New Project Statement** in the right side panel.



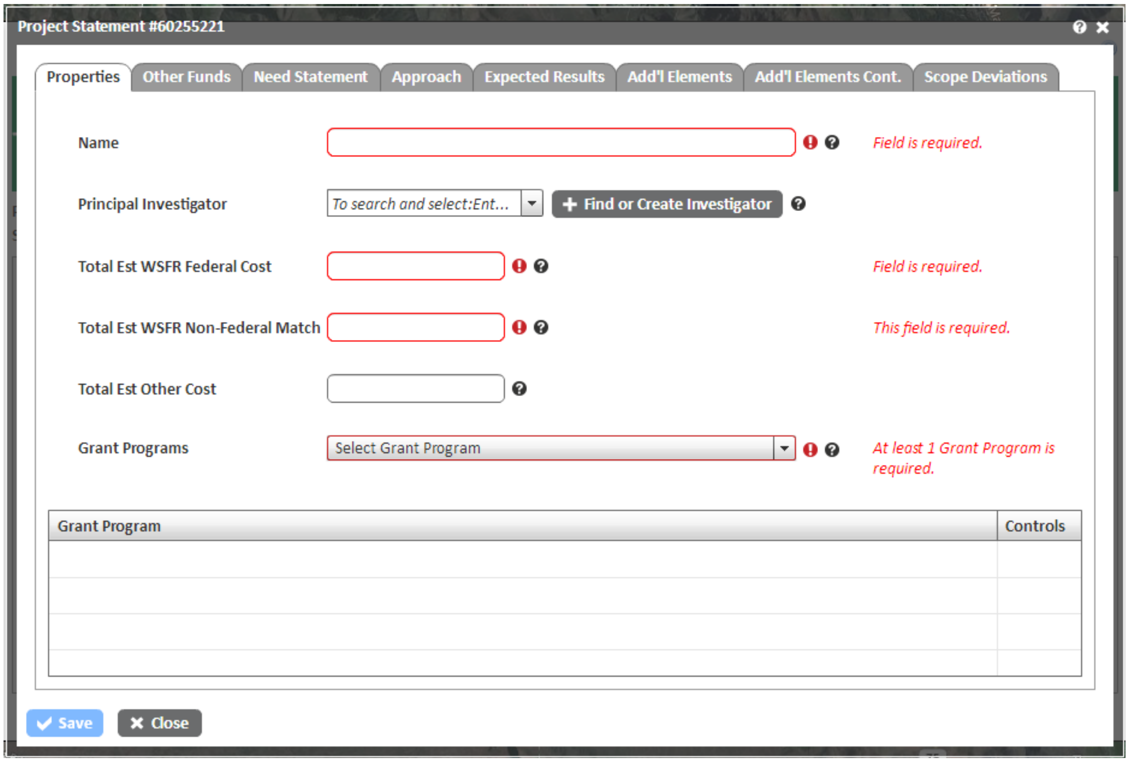
Project Statement Properties Tab

2. The Project Properties Tab opens.
    - **Important:** <u>Do not click close without saving first!</u> The Save button is not active until required data is entered under the Properties, Need Statement, Approach, and Expected Results tabs.

3. Enter the Name of the Project Statement. Use the standard naming convention:
    - State Abbreviation - Descriptive Title (optional FBMS/FAIMS/Year identifiers) Example: CO - Butte Basin Wildlife Area Operations and Maintenance Project (FY 2014)

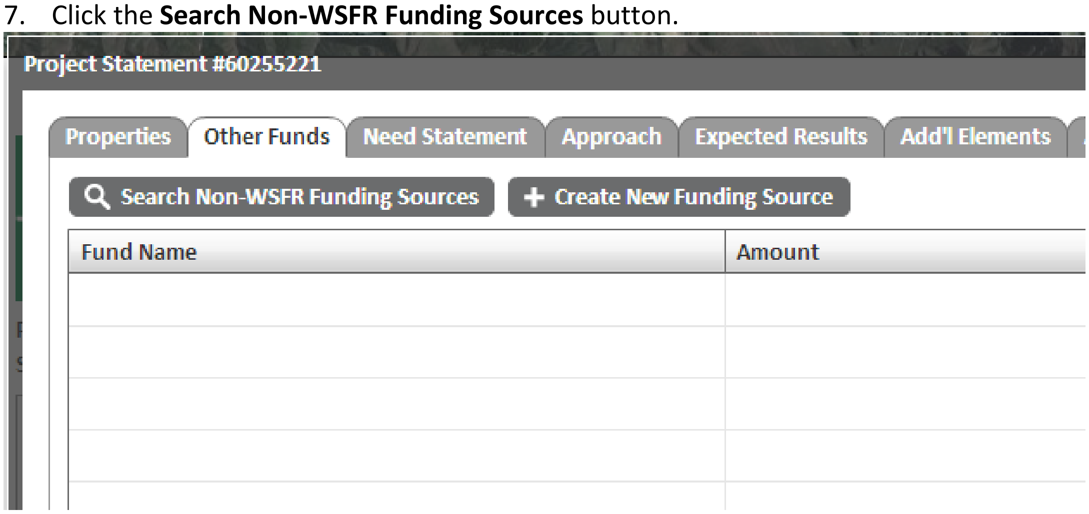
4. Enter the Principal Investigator if applicable (e.g. project or research leader) by typing the first few letters of the investigator's name. If no matches are found select the Create New Contact button. Refer to Create New Contact.

5. Enter the **Total Est WSFR Federal Cost** (federal grant amount) and **Total Non-WSFR Cost** (state match). If applicable, use the **Other Costs** field to document funds received from outside partners (such as other agencies or NGOs).
6. Select the **Grant Program(s)** from the drop down menu. All relevant grant programs must be entered. State users will not be able to update this information once an award is associated with the Project Statement.

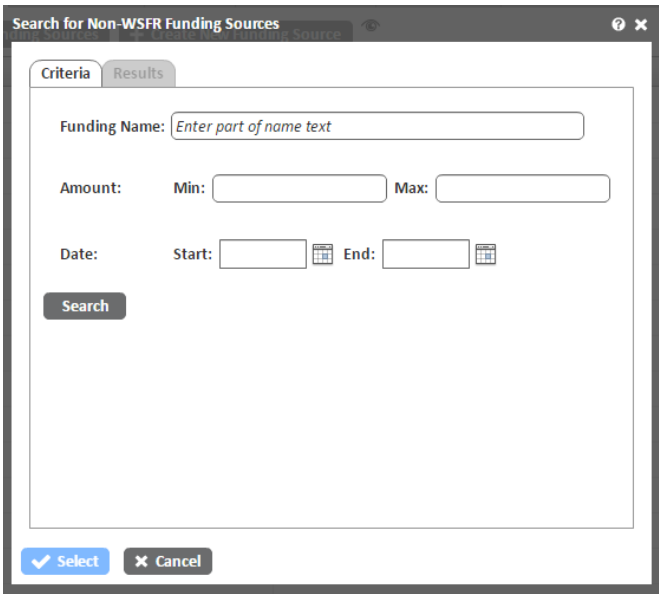


Project Statement Other Funds Tab (fill out if Other Costs entered on previous tab)

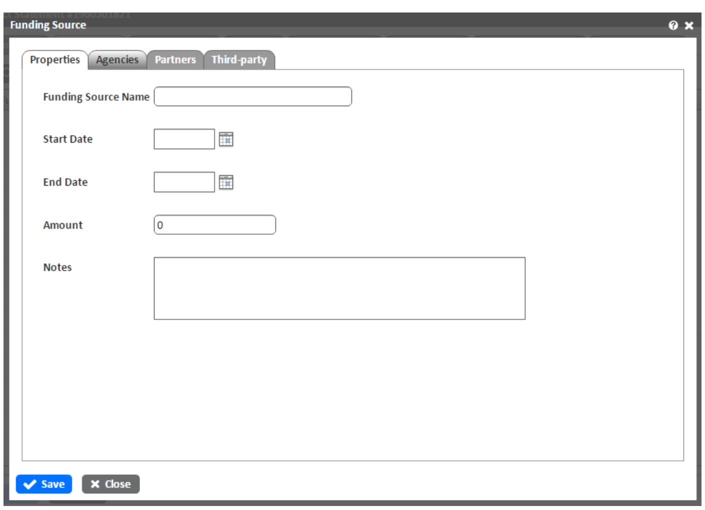
7. Click the **Search Non-WSFR Funding Sources** button.



8. The Search for Non-WSFR Funding Sources form displays.
   - Enter the Funding Name.
   - Enter the Amount.
   - Enter a Start Date and End Date.
   - Click the Search button to search for the funding source. If not match is found, click Cancel.

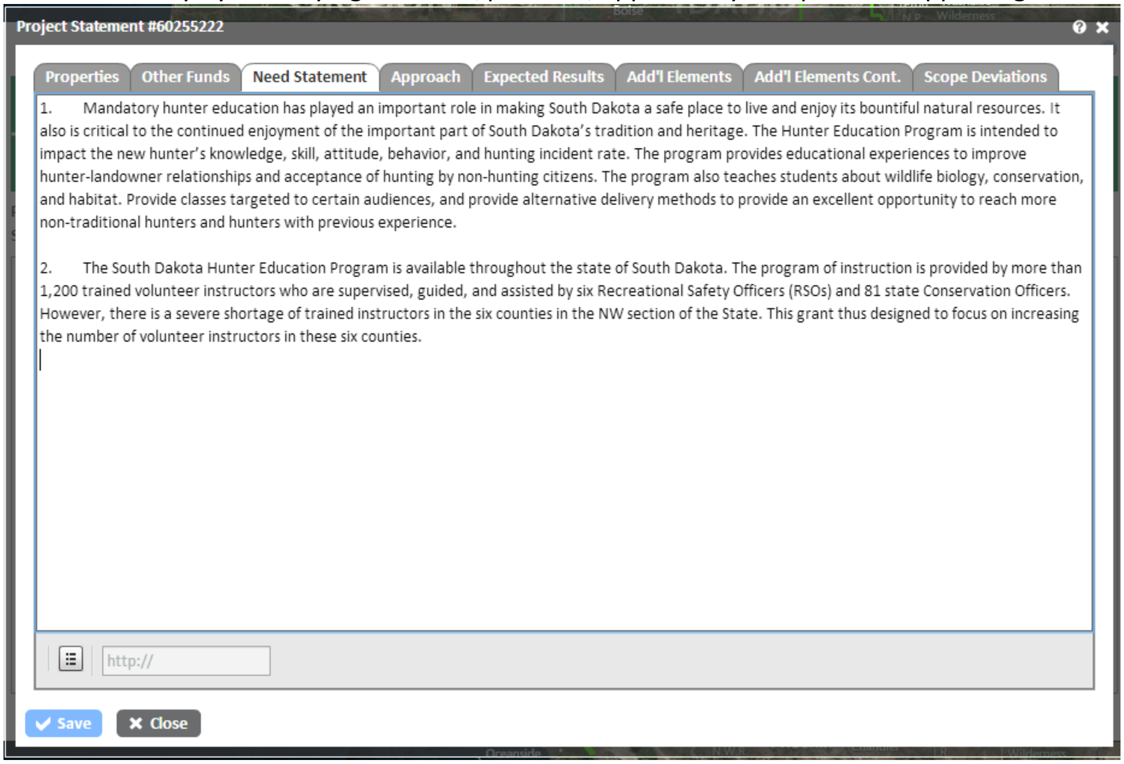


9. If no match was found, click the **Create New Funding Source** button.
   - Enter the Funding Source Name (e.g. Trout Unlimited).
   - Enter the Start Date and End Date.
   - Enter the Amount and applicable Notes.
   - Click the Save button to save the funding source.
   - Enter Agencies, Partners, or Third-parties associated with the funding source if applicable; otherwise, click the Close button to close the New Funding Source form.



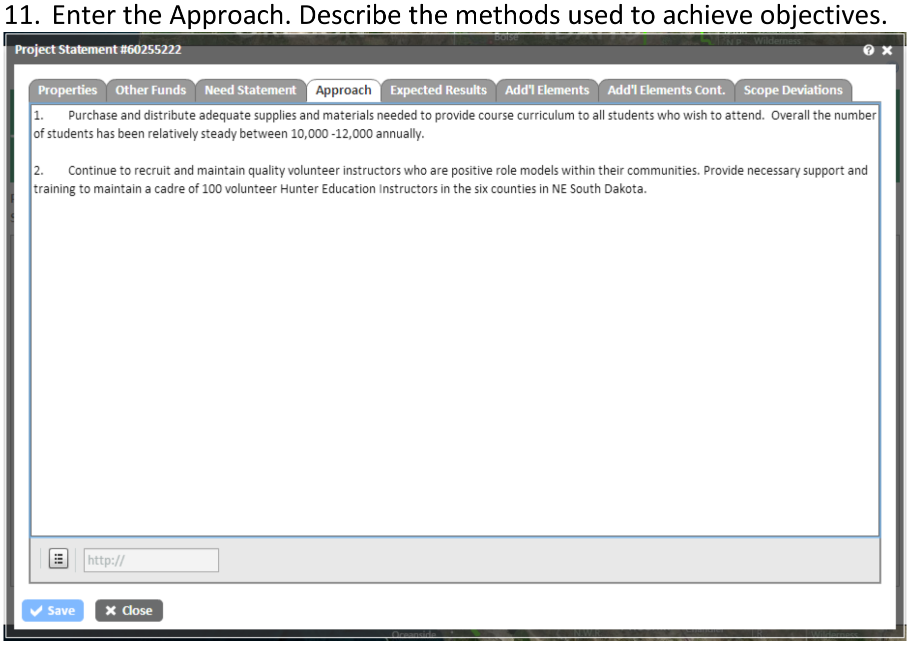
Project Statement Need Statement Tab

10. Enter the Need Statement (or copy/paste). The need statement should explain why the project is necessary by identifying the issue/problem/opportunity and provide supporting evidence.



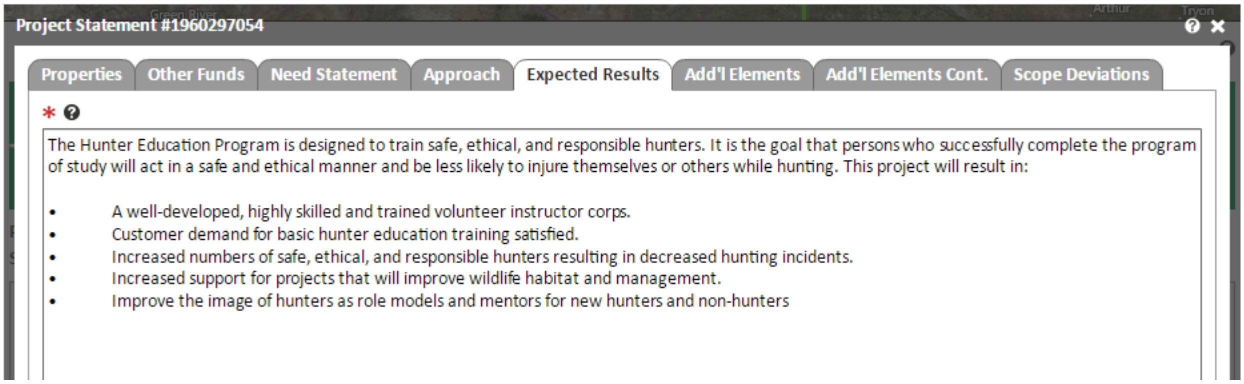
Project Statement Approach Tab

11. Enter the Approach. Describe the methods used to achieve objectives.



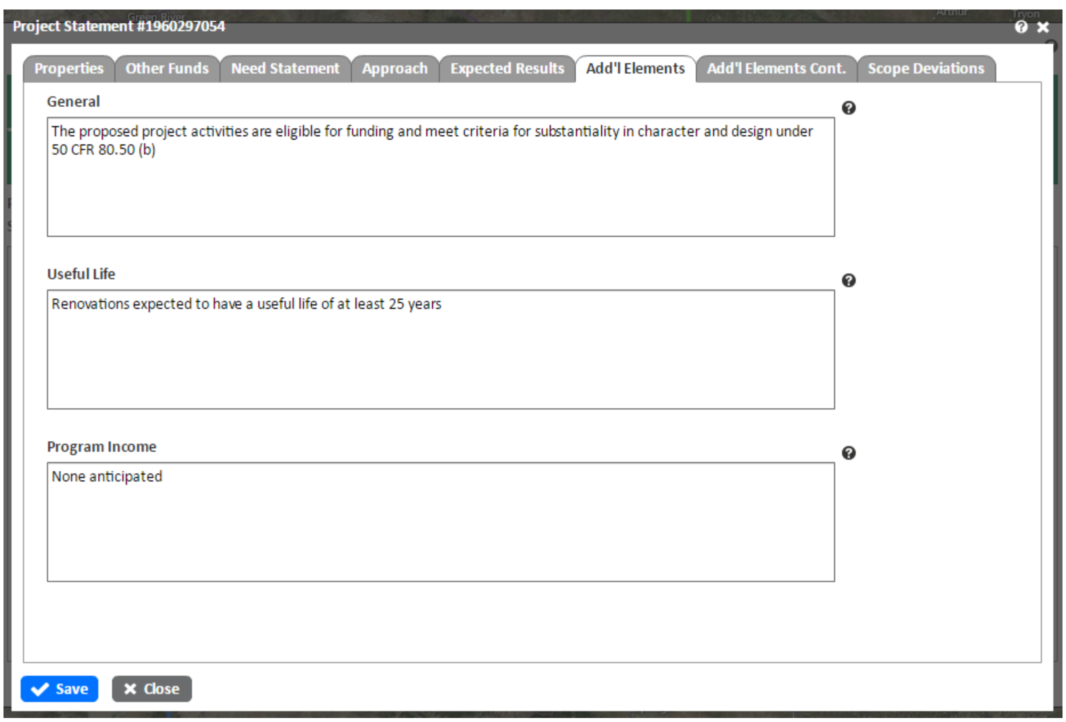
Project Statement Expected Results Tab

12. Enter the Expected Results. The expected results describe benefits of the project to users and/or species.
13. Click **Save**. The Save button is activated once all of the required fields have been filled in. If the Additional Elements and Scope Deviation tabs are not applicable, click the **Close** button.



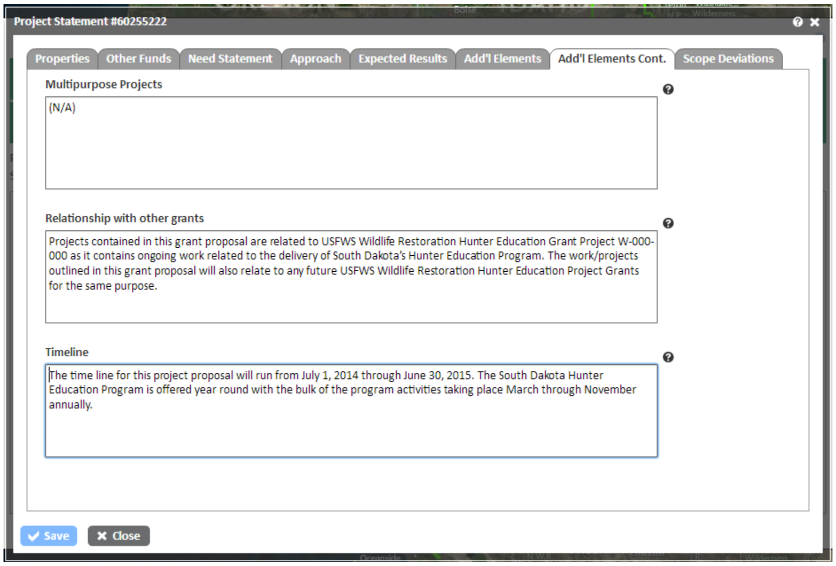
Project Statement Additional Elements Tab

14. Enter information into the Additional Element fields as applicable.
    - **General:** general information about the project, such as compliance information
    - **Useful Life:** expected life of capital improvements with reference to method used to determine it.
    - **Program Income:** estimated program income amount and method.



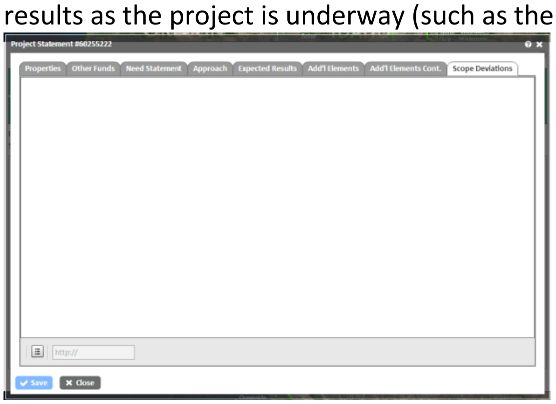
Project Statement Additional Elements Cont. Tab

15. Enter information into the Additional Element Continued fields as applicable.
    - **Multipurpose Projects:** describes activities related to another grant or not related to a grant.
    - **Relationship with other grants:** relationship between the project and other work funded by federal grants.
    - **Timeline:** an estimated schedule of significant milestones towards completing the project.



Project Statement Scope Deviations tab

16. Enter the Scope Deviation if applicable. This field is used to describe changes in the scope that results as the project is underway (such as the reason for an amendment).

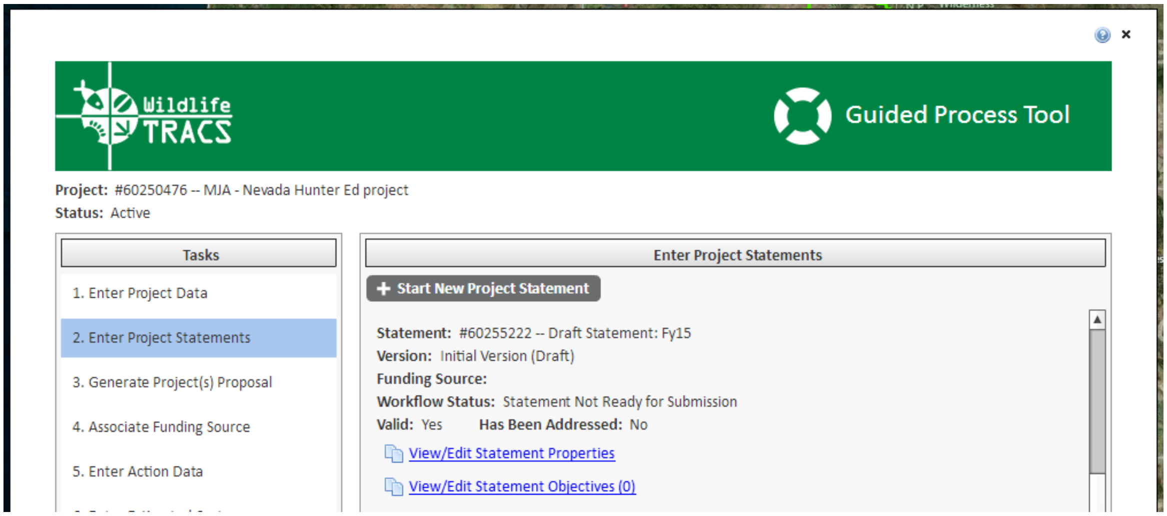


Save and Close

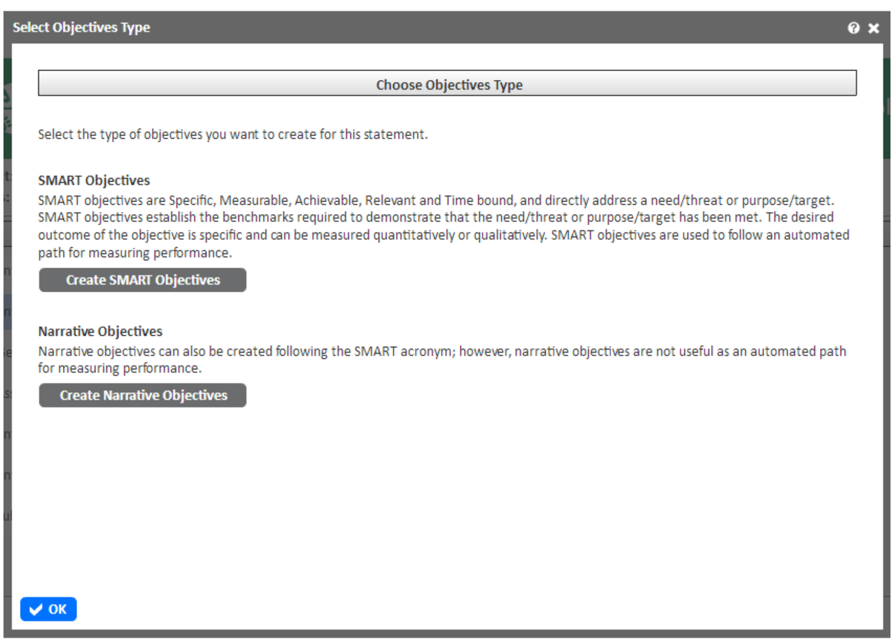
17. Click the Save and OK button. Click the Close button to close the Project Statement form. You will be directed back to the **Guided Process Tool**. Use the links on the right side to view or edit the project statement.

Lesson 5: Entering Project Objectives

1. From the Guided Process Tool, click **2. Enter Project Statements** in the task panel on the left. Then click the **View/Edit Statement Objectives** button located in the right panel.

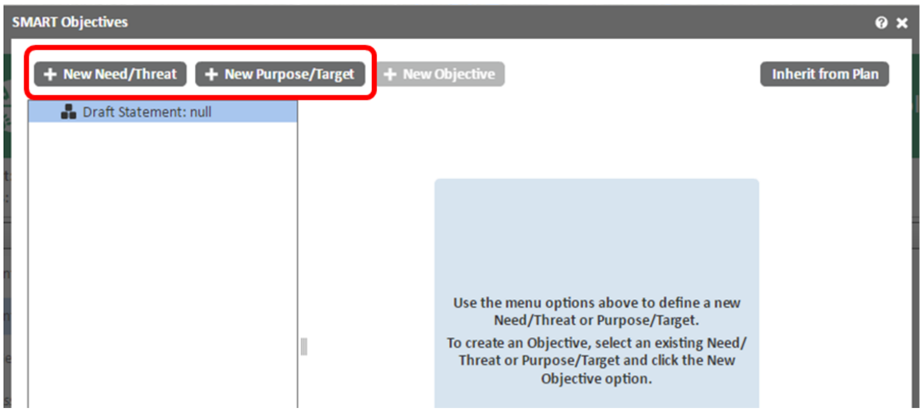


2. Click the **Create SMART Objectives** button.
   - Note: **SMART Objectives** are the preferred method because they establish benchmarks for measuring performance. There is also an option to **Create Narrative Objectives,** which can be used if a SMART objective cannot be created.



3. Select either the **New Need Threat** or **New Purpose Target**.
   - Select the **New Need/Threat** button to indicate the reason for the objective if not related to a specific species/habitat.

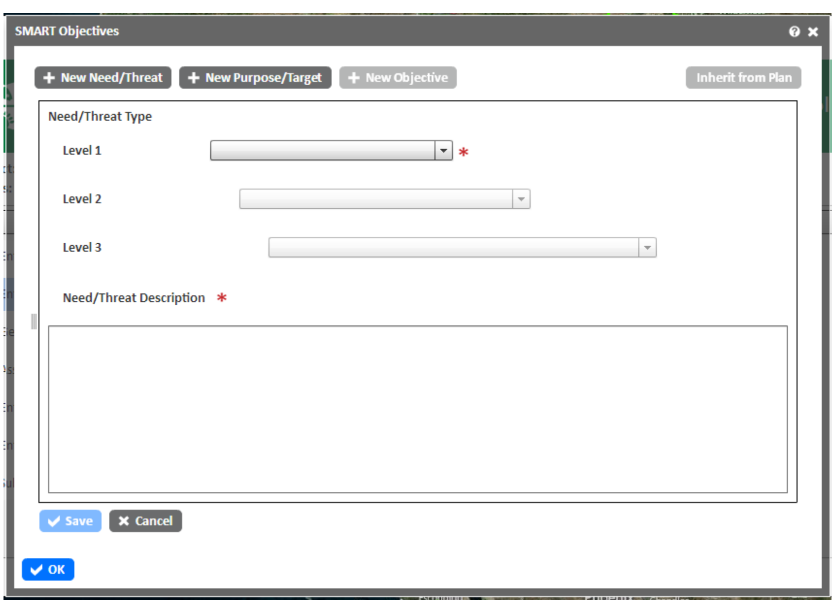
   OR
   - Select the **New Purpose/Target button** to indicate specific species or habitat(s) targeted by the objective.



4. Fill out the Need/Threat or Purpose/Target form to identify the reason for the objective(s).

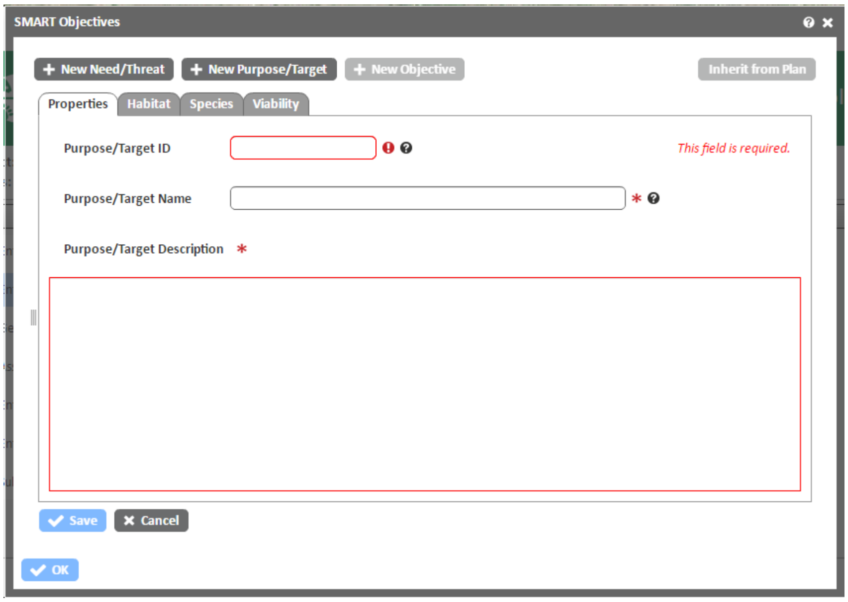
New Need/Threat:

- Select a Level 1 **Need/Threat Type** from the drop downs that best describes the need for the objective(s), e.g. resource management need. **Note:** Level 2 & 3 are optional but should be filled out if possible.
- Fill in the Need/Threat description.



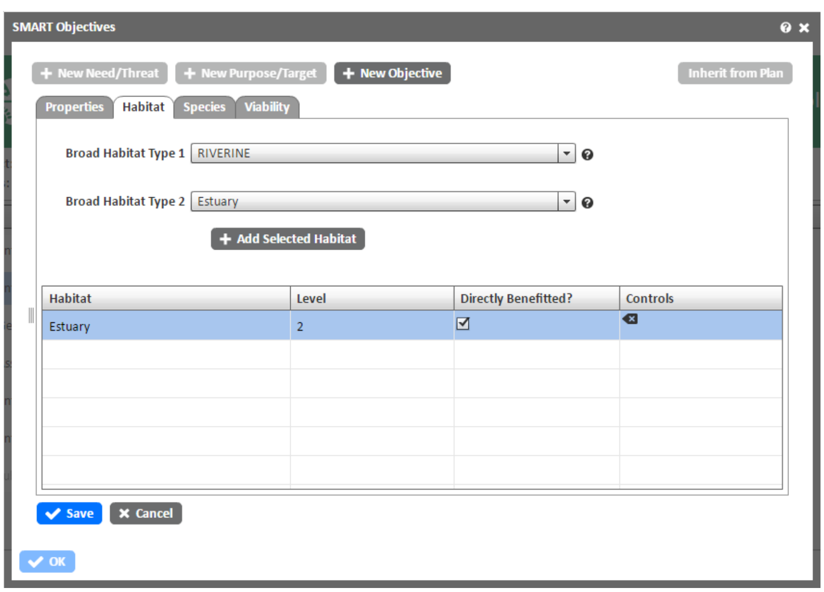
New Purpose/Target:

- Enter the Purpose/Target ID (e.g. a numbering system such as 1, 2, 3 or A, B, C etc.)
- Enter the Purpose/Target Name
- Fill in the Purpose/Target description.



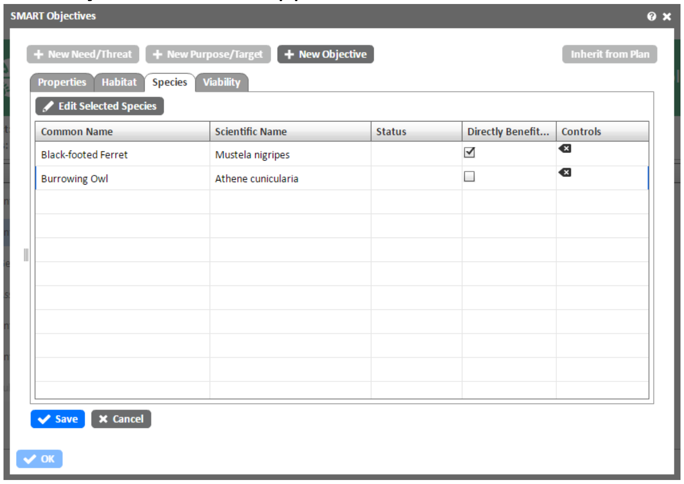
Habitat tab:

- If applicable, select the Broad Habitat Type 1 & 2 from the drop down menus (Type 1 determines the options available to specify type 2).
- Click **Add Selected Habitat** to add it to the table below. Check the box for **Directly Benefitted** if applicable. To remove a habitat from the list, click the x button in the Controls column.



Species tab:

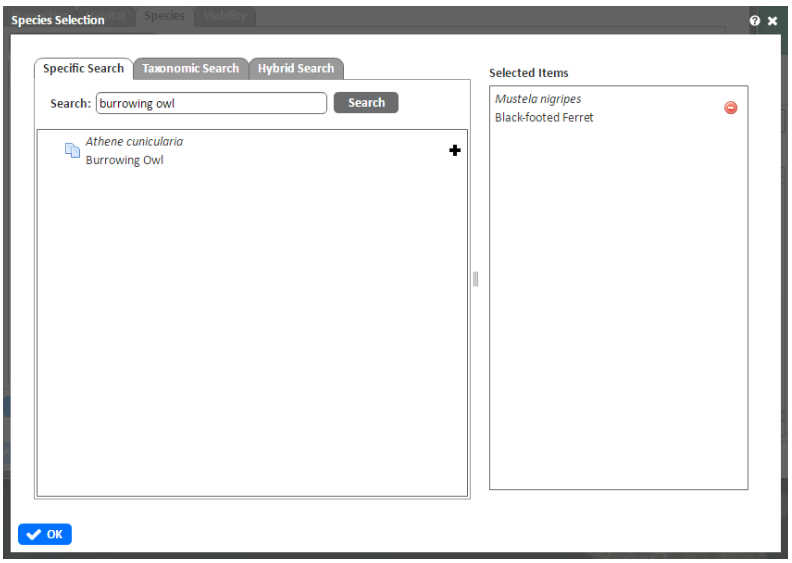
- If applicable, click **Edit Selected Species** to edit or add a species to the list. Check the box for **Directly Benefitted** if applicable.



- Search for the species using the search tabs:
  - **Specific Search tab:** enter part of the common name or scientific name and click Search.
  - **Taxonomic Search tab:** select the taxonomic level (e.g. genus) and enter the name in the search field. Click on the + sign to expand the menu and select the level to add before clicking the + sign to move the item over to the right side.
  - **Hybrid Search tab:** search for the species and click the plus sign (+) to add the two species to the Species 1 and 2 boxes (e.g. add a tiger and a lion to create a liger).

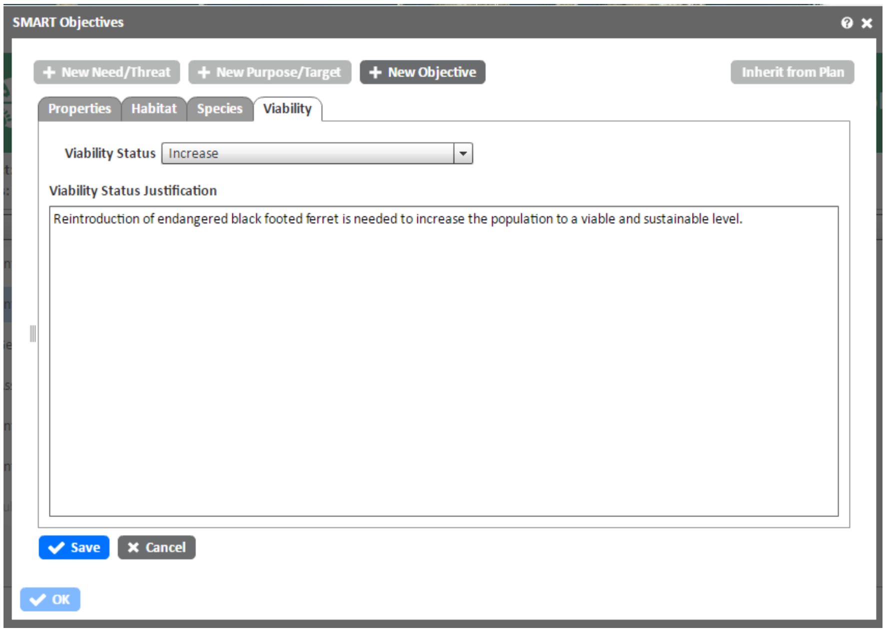
- Click the plus sign to add a species to the Selected items on the right side (or click on the red minus sign to remove a species).

- Click OK to return to the previous screen.



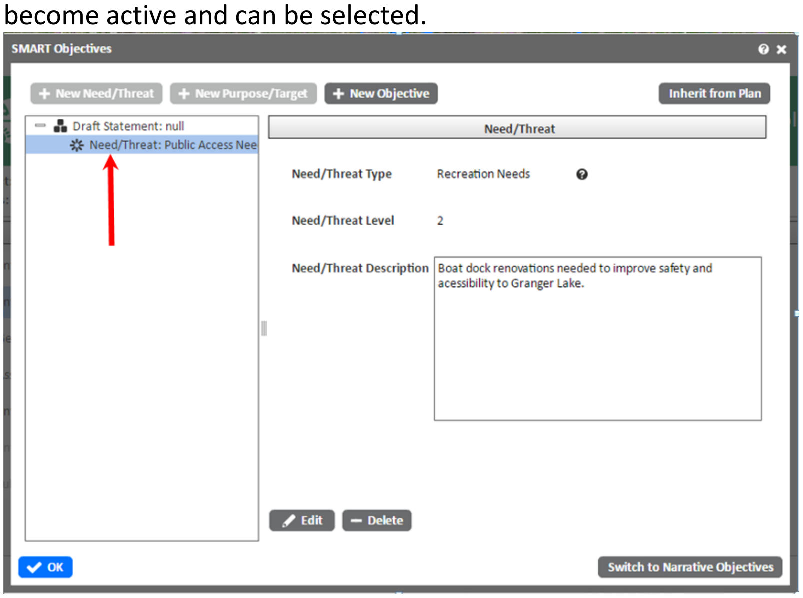
Viability tab:

- **Viability Status:** select the status if applicable (Increase, Decrease or Sustain)
- **Viability Status Justification:** provide an explanation of the status

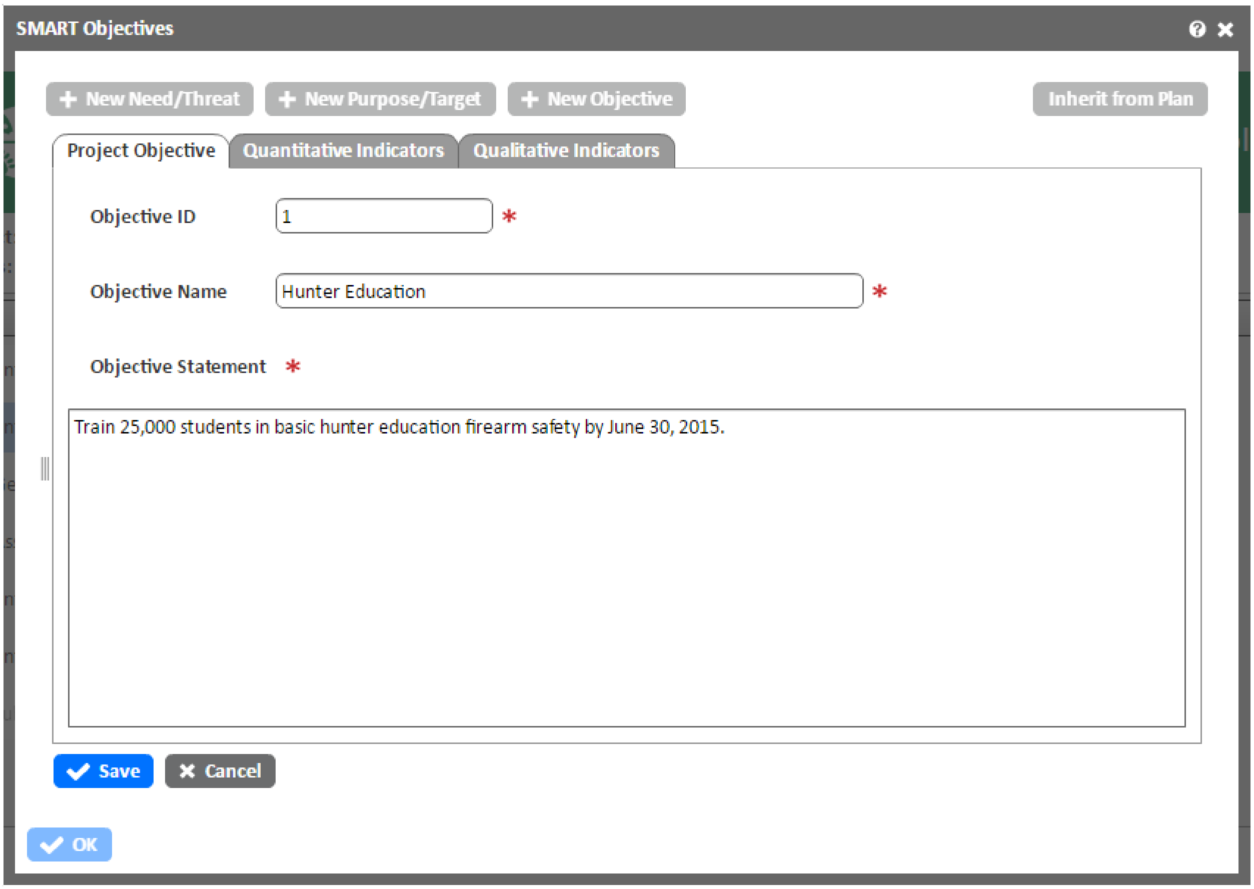


5. Click the **Save** button.

6. Expand the **Project Statement** tree in the left panel by clicking the (+) sign. Click the newly created **Need/Threat** or **Purpose/Target** in the left panel. The **New Objective** button will become active and can be selected.



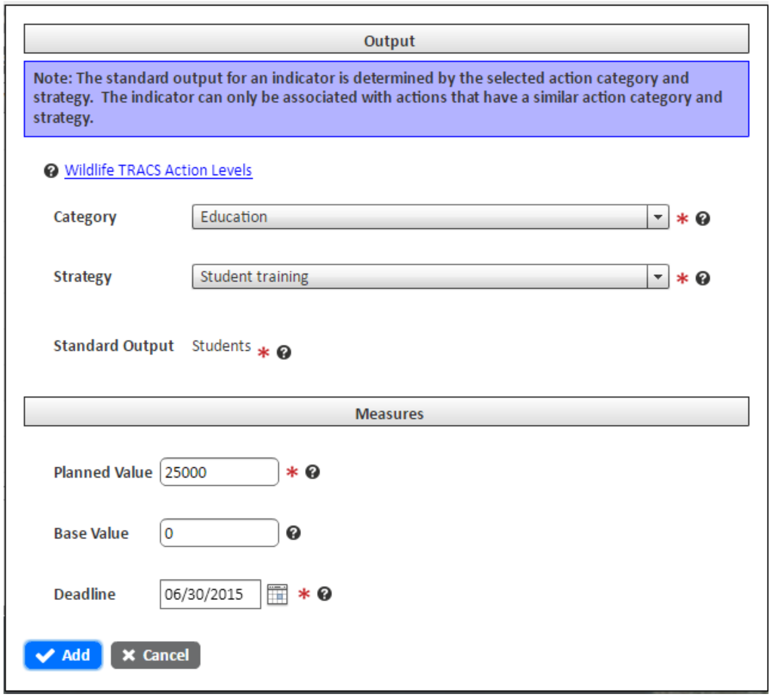
8. Fill in the required **Project Objective** fields.
    - **Objective ID** (follows a numbering system such as 1, 2, 3 or A, B, C or another state-used ID)
    - **Objective Name:** short title
    - **Objective Statement:** best practice: enter as "(Action verb) _____ (how many) _____ (who or what) _____ (by when) _____." E.g. Train 25,000 students in basic hunter education firearm safety by June 30, 2015.



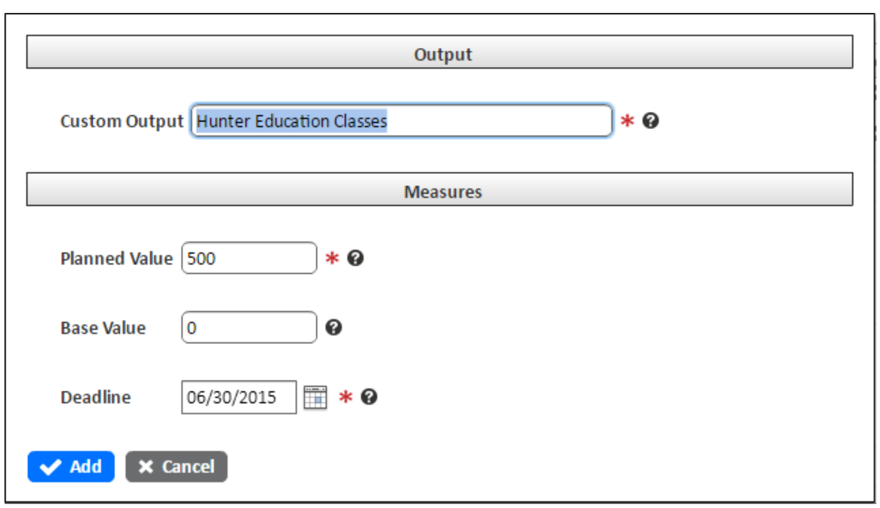
9. Go to the **Quantitative Indicator** or **Qualitative Indicator** tab to add one or more indicators to track progress on the completion of the objective.
    - **Quantitative Indicators** are used for measurable outcomes (i.e. number of acres)
    - **Qualitative Indicators** are used for all objectives that do not have a measurable component (such as Administrative Support) and tracks whether it was completed or not (i.e. True or False)

10. Add the indicator(s) that will be used to measure the completion of the objective.
    - Click the **New Standard Indicator** button to select an existing standard indicator.
        - Select the Category and Strategy to use a standard output built in TRACS (the standard output unit will display, such as acres)
        - Enter the **Planned Value** (how many are estimated to be accomplished, such as number of acres to be restored)

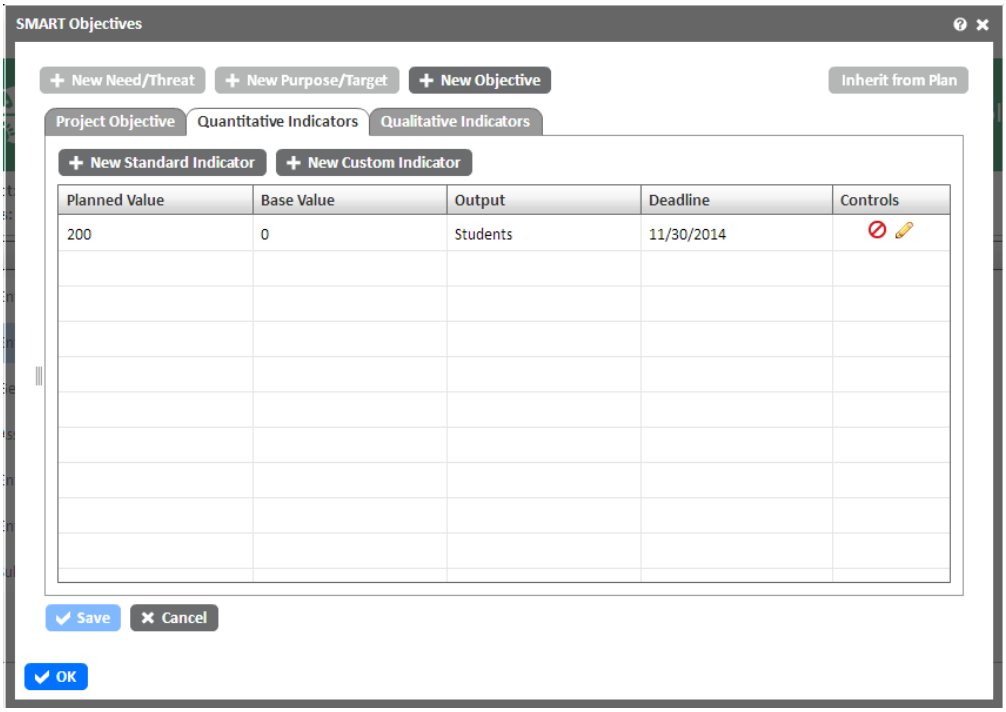
○ Enter the **Base Value** (starting point, usually zero unless the project is a continuation)
○ Enter the **deadline** (when you plan to complete this objective or the project end date)
○ Click **Add**



- Click the **New Custom Indicator** button to add a new custom indicator. This option is used if a standard indicator is not available.
  ○ Enter the **Custom Output** (e.g. number of aquatic education classes taught)
  ○ For Quantitative Only: enter the Planned Value and Base Value.
  ○ Enter the Deadline
  ○ Click **Add**



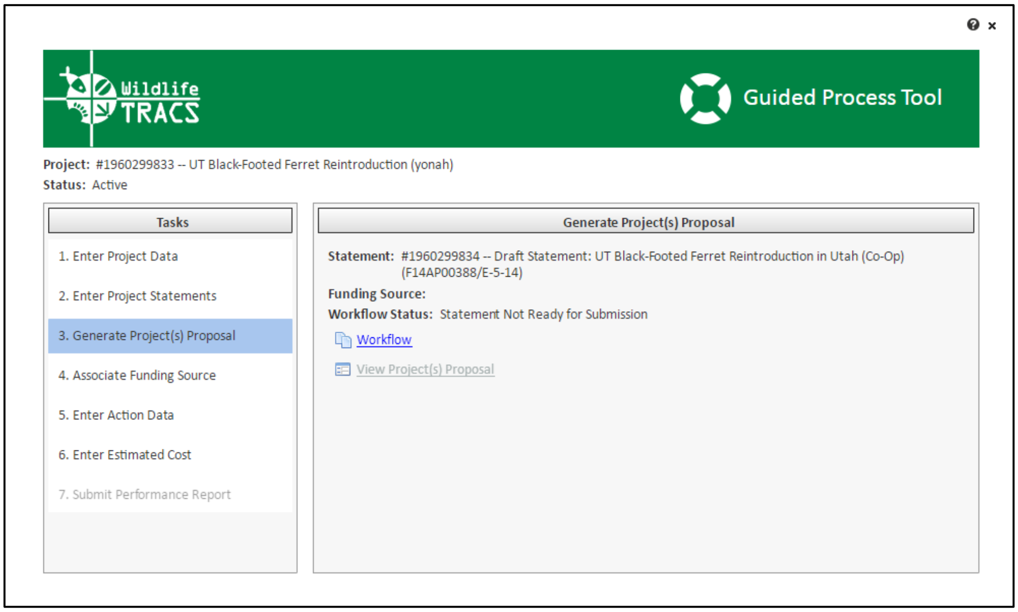
11. The indicator table has been added when it appears in the grid. Click the **Save** button to save the **Objective**. Click the **OK** button to close the **Objective** form.



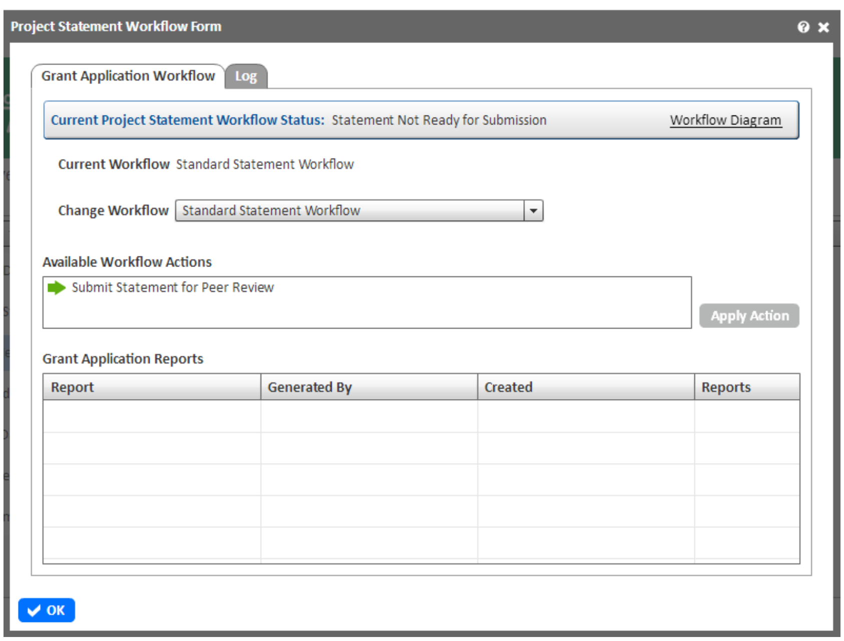
Lesson 6: Generating a Proposal

Submit Project Proposal

1. From the Guided Process Tool, click **3. Generate Project(s) Proposal** link located in the **Tasks** panel. Click on the **Workflow** link located in the right panel.



2. The Workflow window opens.

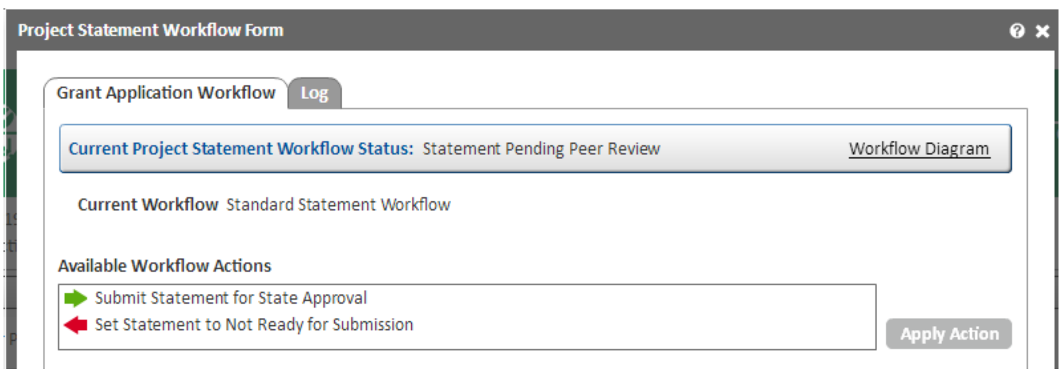


3. WSFR Only - Select **Change Workflow**.
    - Note: The **Interim Statement Workflow** is to be used by WSFR staff to manage the project proposal during the transition period. The **Standard Statement Workflow** should be used when both State and WSFR share in the responsibility of managing the **Project Statement** through the approval process.

4. Click the appropriate **Available Workflow Action** (ex. Select **Submit Statement for Peer Review**). Click the **Apply Action** button to execute the selected workflow action.
    - You can view a small version of the **Workflow Diagram** by clicking the **Workflow Diagram Link** located to the far right of the **Current Project Statement Workflow Status** label.

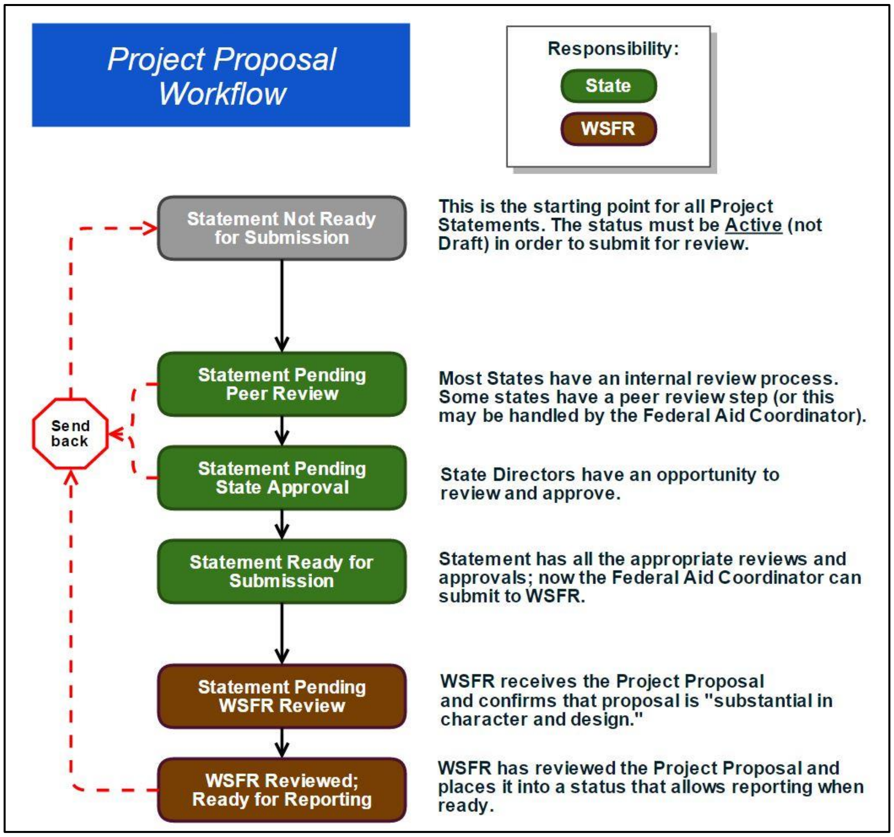
5. Continue to click the **Available Workflow Actions** and the **Apply Action** button until all applicable actions have been executed (each state or federal user responsible for review and/or approval will need to complete this process to send the project proposal through to approval). If needed, contact the other users responsible for reviewing or approving the project.

6. Once the project proposal has gone through the approval process, the status will be **WSFR Reviewed Ready for Reporting**, which will allow for reporting on actions in order to generate the performance reports. Refer to the **Standard Statement Workflow** diagram below.



7. Click the **Log Tab** to view a log of executed workflow actions.

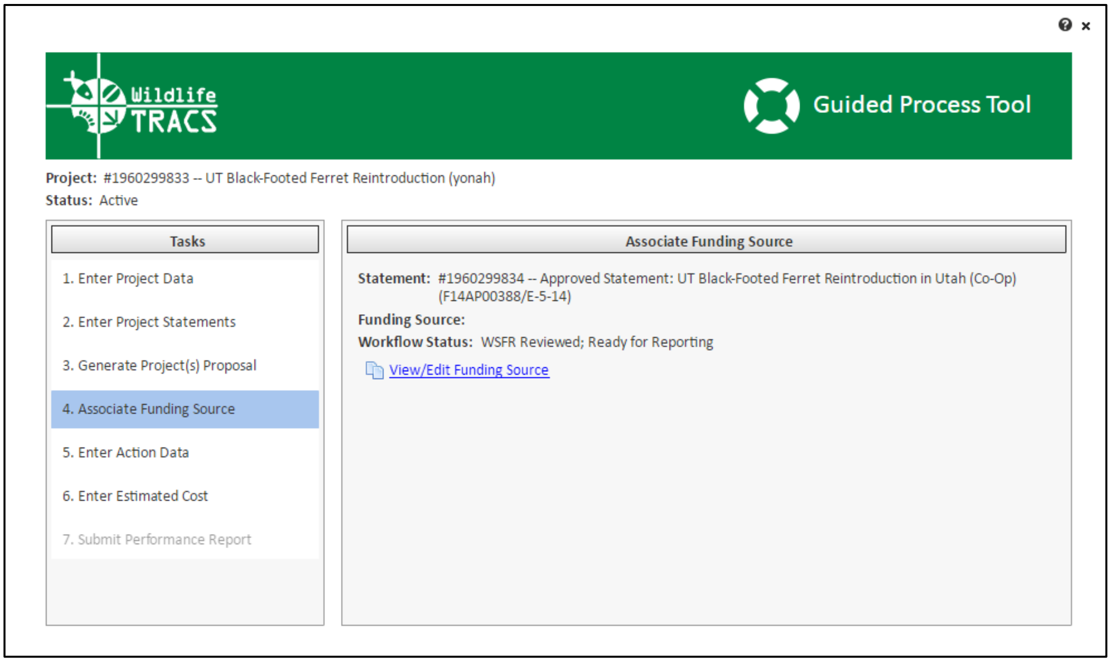
8. Click the **OK** button to close the **Workflow** form.


Project Proposal Workflow
Responsibility:
State
WSFR
Statement Not Ready for Submission
This is the starting point for all Project Statements. The status must be Active (not Draft) in order to submit for review.
Statement Pending Peer Review
Most States have an internal review process. Some states have a peer review step (or this may be handled by the Federal Aid Coordinator).
Send back
Statement Pending State Approval
State Directors have an opportunity to review and approve.
Statement Ready for Submission
Statement has all the appropriate reviews and approvals; now the Federal Aid Coordinator can submit to WSFR.
Statement Pending WSFR Review
WSFR receives the Project Proposal and confirms that proposal is "substantial in character and design."
WSFR Reviewed; Ready for Reporting
WSFR has reviewed the Project Proposal and places it into a status that allows reporting when ready.

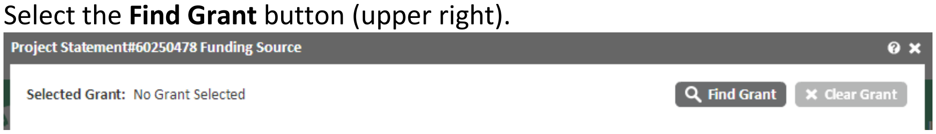
Lesson 7: Associating a Funding Source

Associating a grant funding source to a project statement in TRACS is a **WSFR-only function**. States do not need to perform this step.

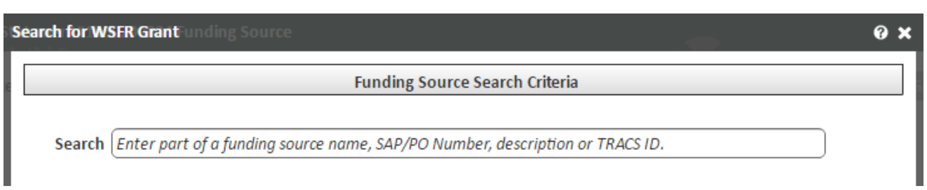
1. From the Guided Process Tool, click **4. Associate Funding Source** link located in the **Tasks** panel. Select the **View/Edit Funding Source** link displayed in the right panel.



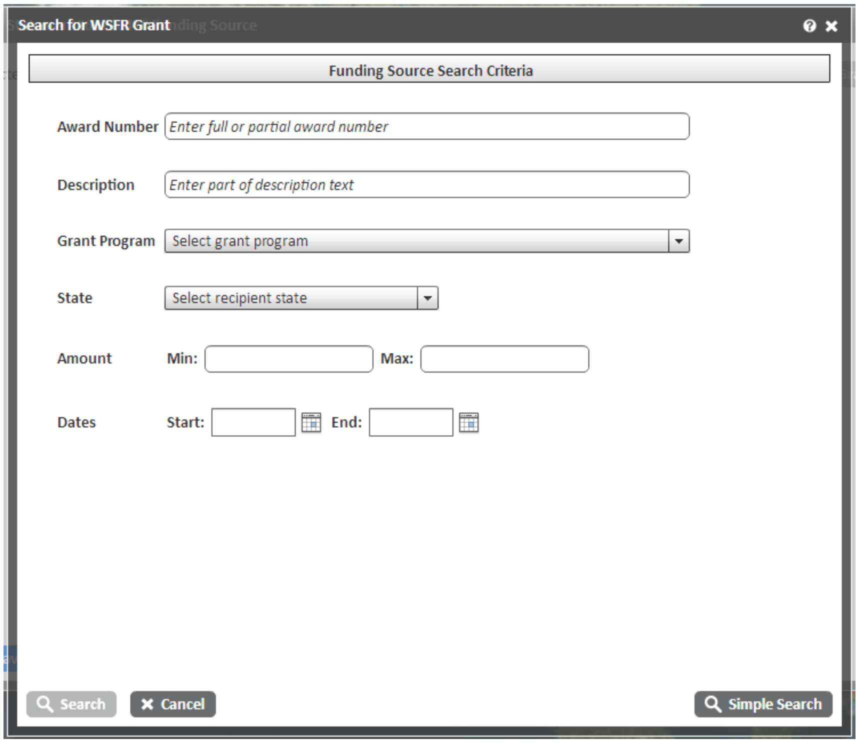
2. Select the **Find Grant** button (upper right).



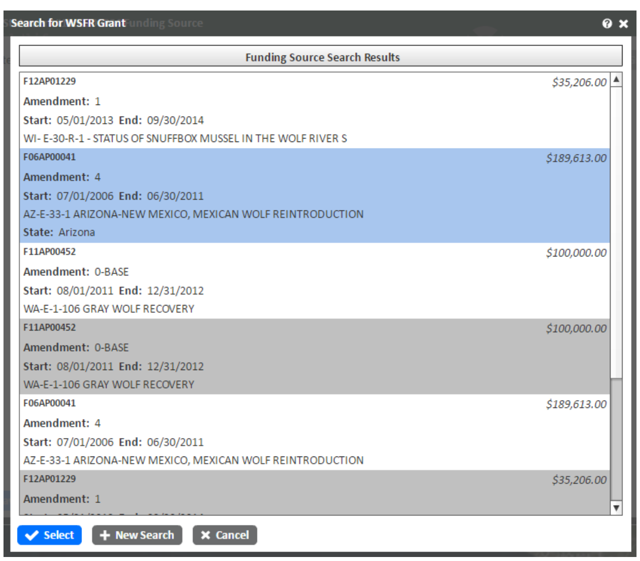
3. The search form displays. In the Search box, enter part of the funding source name, SAP/PO Number, description or TRACS ID. Click **Search**.



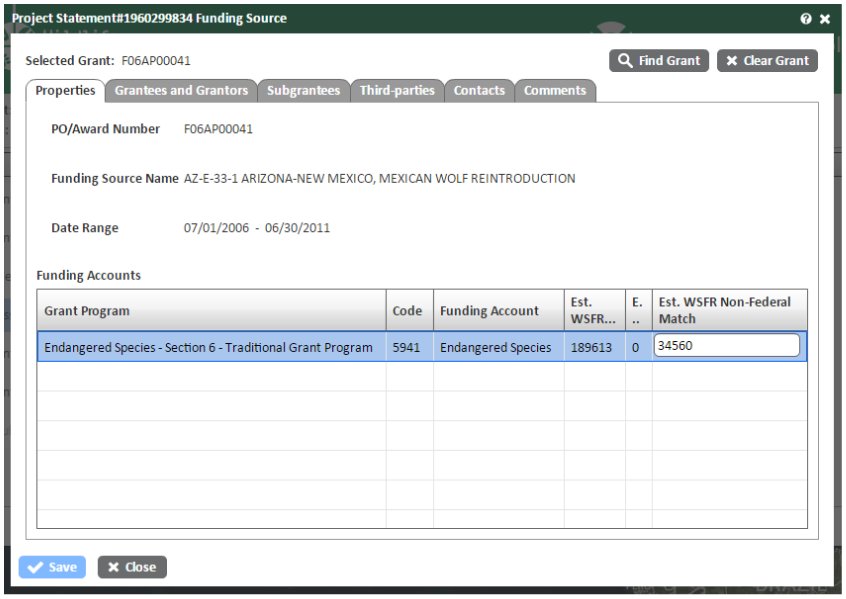
- Optional: Click the **Advanced Search** button in the lower right to add additional search parameters.



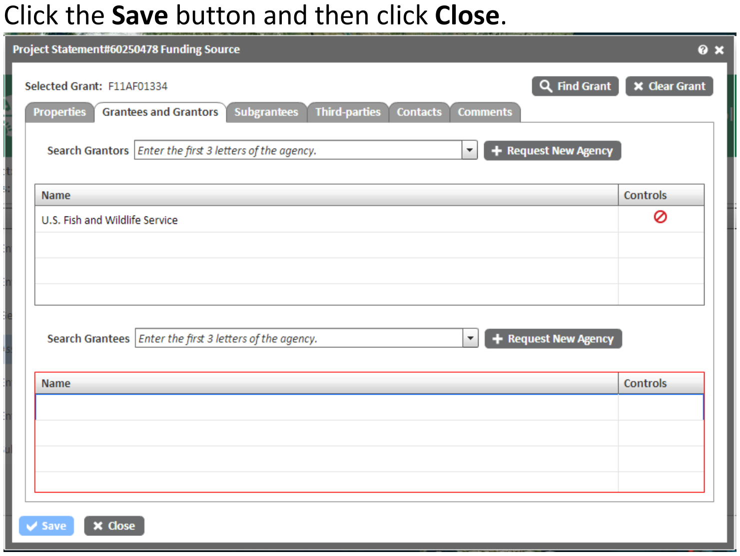
4. Click the desired funding source from the results list. If the desired award is not found, click the **New Search** button to modify your search parameters and search again. Click **Select** when the award is highlighted in blue.



5. The **Project Statement Funding Source** form is displayed.
    - Enter the **Est. WSFR Non-Federal Match** dollar amount.
    - The **Funding Source** form data is shared by all **Project Statements** that utilize the selected funding source. Edits have the potential to impact other **Projects**.

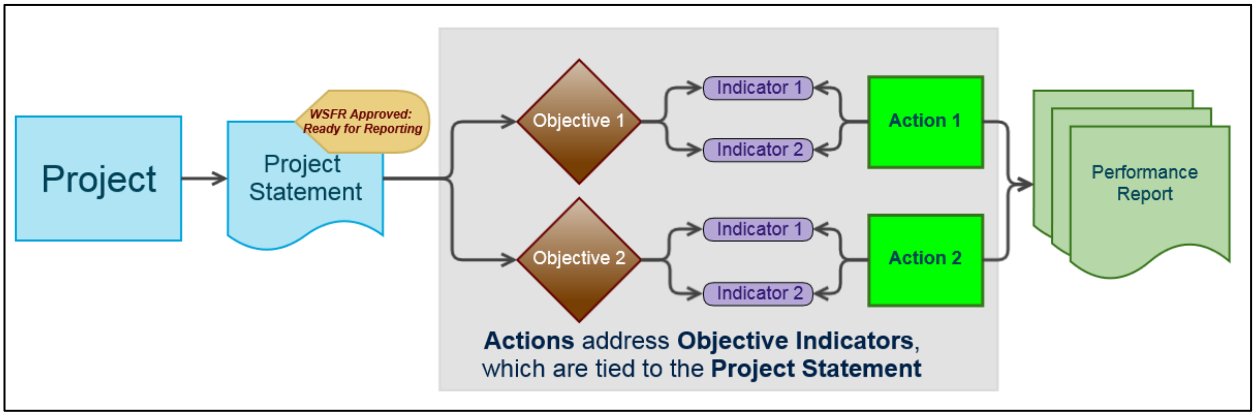


6. Click the **Grantees and Grantors Tab**.
    - Select the **Grantors and Grantees** from the drop down lists by typing the first three letters of the grantor name and grantee name.
    - If no matches exist, select the **Request New Agency** button.
7. Fill out the Subgrantees, Third-parties and comments tabs if applicable.
8. Click the **Save** button and then click **Close**.

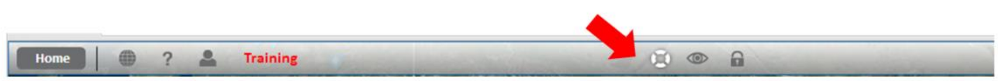


Lesson 8: Mapping and Entering Actions

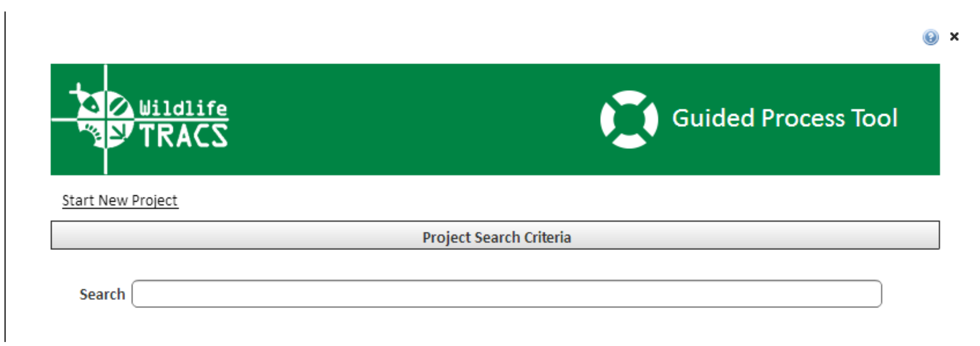
Performance reporting is done primarily through TRACS data fields at the Action level. Performance reports are created by adding actions that tie to the objectives and indicators set up in the project statement(s). This is where progress toward meeting objectives is documented in quantitative, qualitative or narrative fields. Estimated costs are entered at the action level and then the actions are bundled into the performance report, which is submitted for review/approval (state/federal).



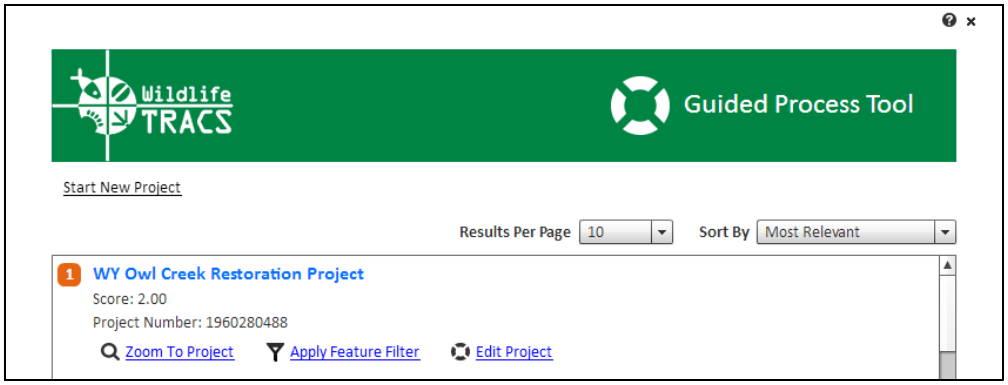
1. Select the **Guided Process Tool** from the **Mapper Toolbar** (top of screen).



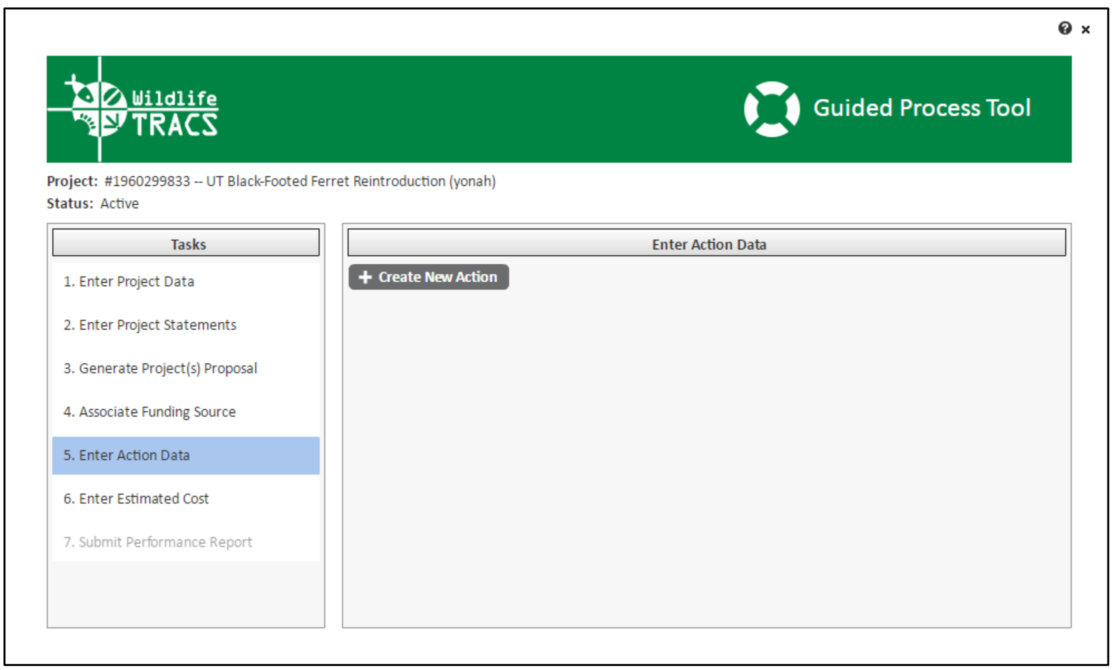
2. Enter the project name/number into the Search box and click **Search** (or use the Advanced Search).



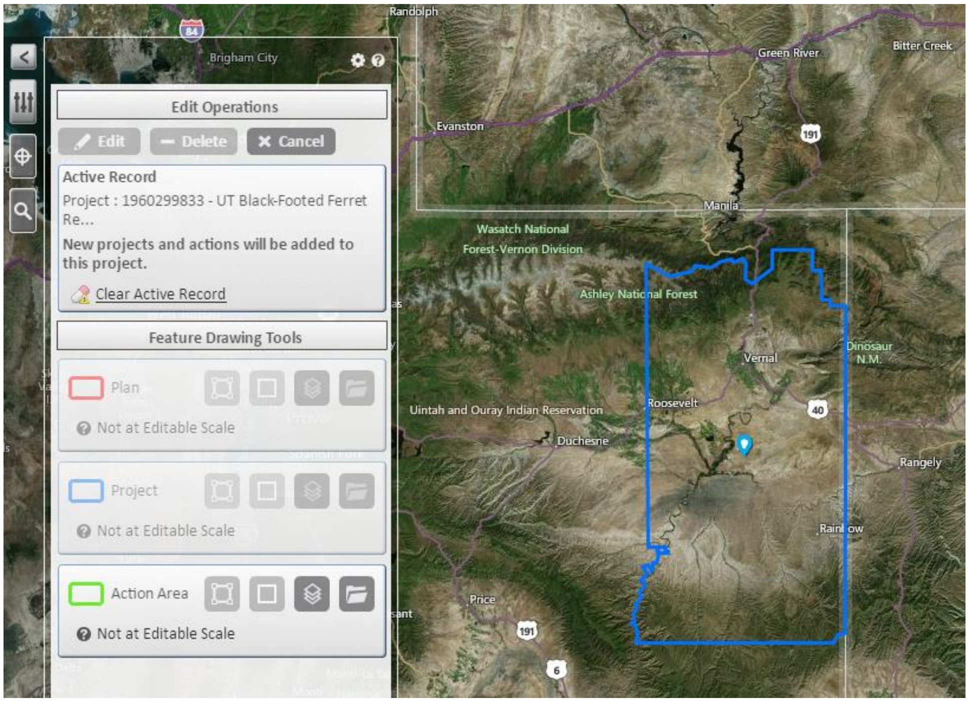
3. The search results will display.
    - Select **Zoom to Project** to zoom the map to the project location
    - Click **Apply Feature Filter** to filter the map to only view that project
    - Click **Edit Project** to open the Guided Process Tool for the selected project



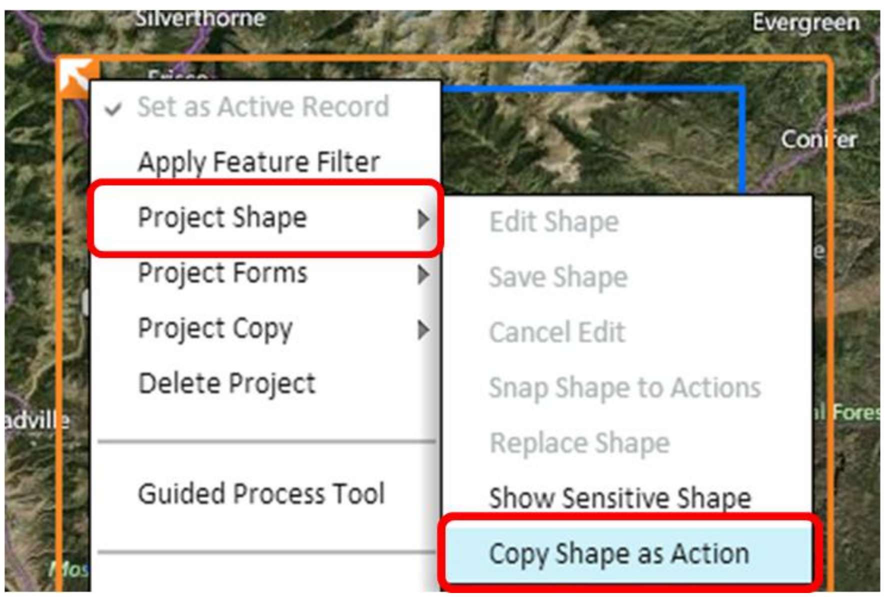
4. Click the **5. Enter Action Data** link in the **Tasks** panel of the Guided Process Tool. Click the **Create New Action** button located in the right panel.



5. The Feature Editor window will open on the left. Select the one of the feature drawing or selection tools for the action (see the Shape Editing section for more information).



- To copy the project shape as the action shape, click on or in the blue project boundary. The orange feature frame box will open. Click on the arrow in the upper left and select **Project Shape** and **Copy Shape as Action**.

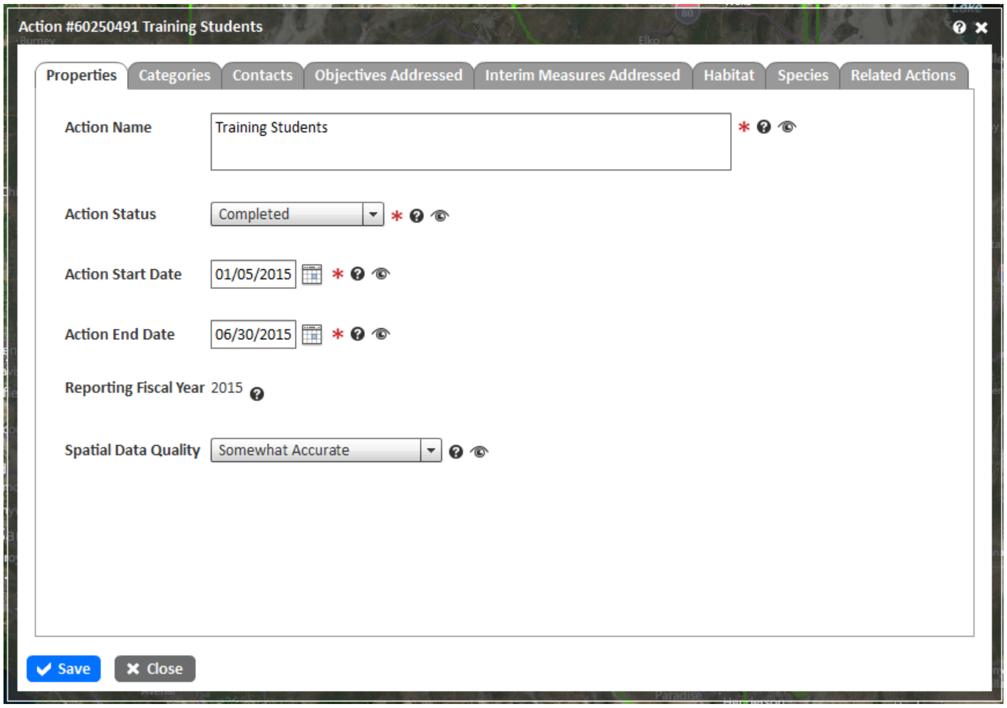


6. Click the **Save** button in the **Feature Editor** when the polygon is complete. The Action form will open.

Action Properties Tab

7. Enter the **Action Name**

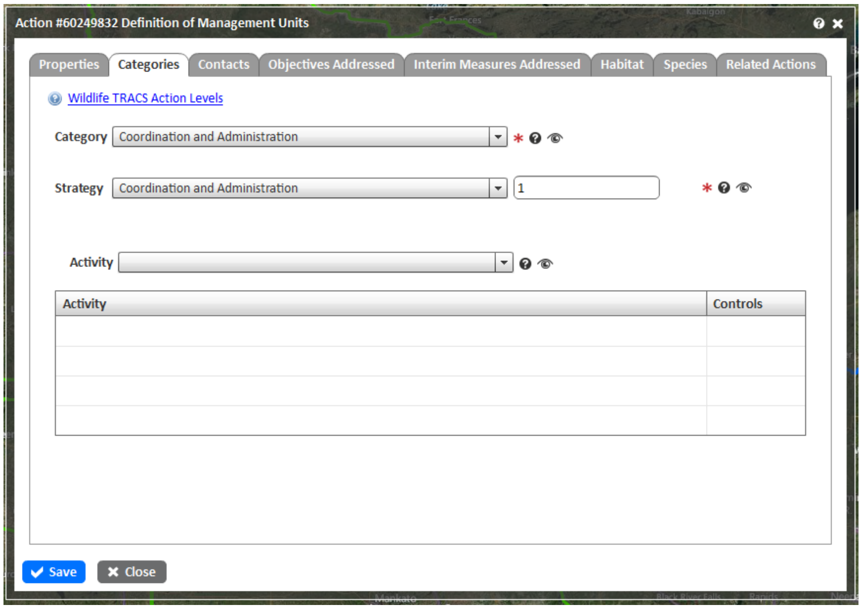
8. Select an **Action Status**
9. Enter the **Action Start Date** and **End Date**
10. Select an option from the **Spatial Data Quality** drop down box (select how accurately the action polygon represents the action)



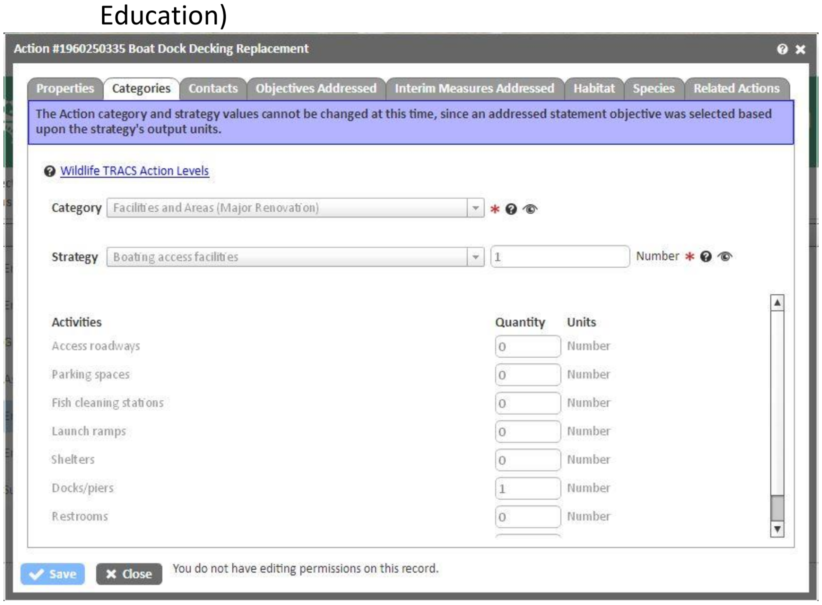
Action Categories Tab

TRACS contains action categories, strategies and activities that are used for "roll-ups" that aggregate data for national reporting.

11. Select the **Category** from the drop down list (e.g. Data Collection and Analysis).
12. Select the **Strategy** from the drop down list (e.g. Research, survey or monitoring-fish and wildlife populations).
13. Enter the output associated with the selected **Strategy** unit (e.g. 20 projects, 1 database, etc.).
14. Select the **Activity** from the drop down list, if applicable (e.g. Abundance determination).



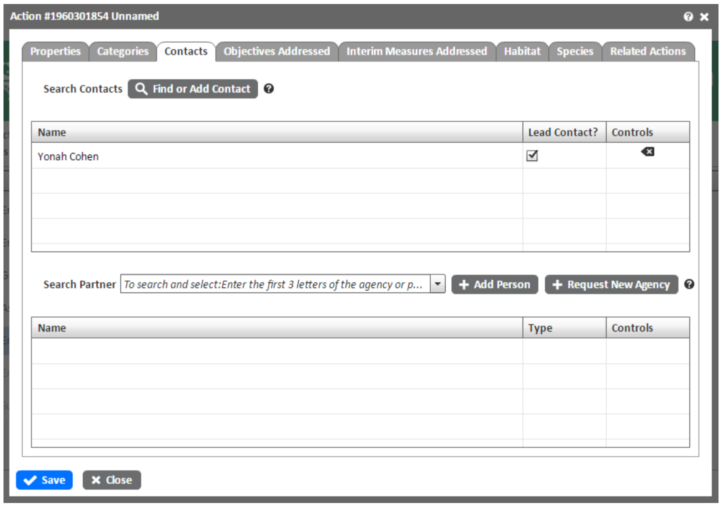
- Below is another example of the Action Categories Tab with Category, Strategy and Activities (Activities only required for Boating Access and Aquatic/Hunter Education)



Action Contacts Tab

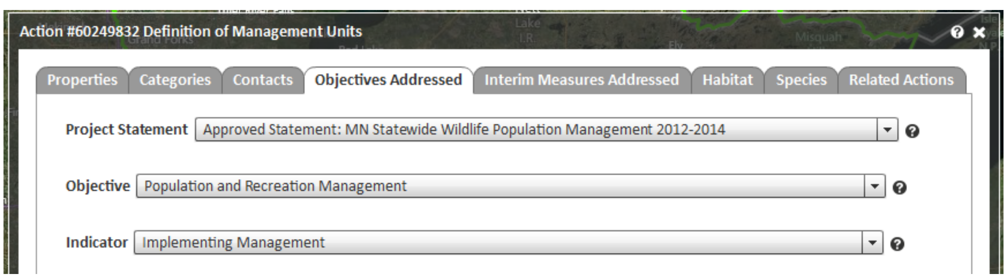
15. Contacts should auto-populate from the project form. Add any missing contacts by clicking **Find or Add Contact**.

16. Add partners if applicable from the **Search Partner** drop down list by typing the first three letters of the **Partner Name** (e.g. Arizona Mollusk and Nature Resources).

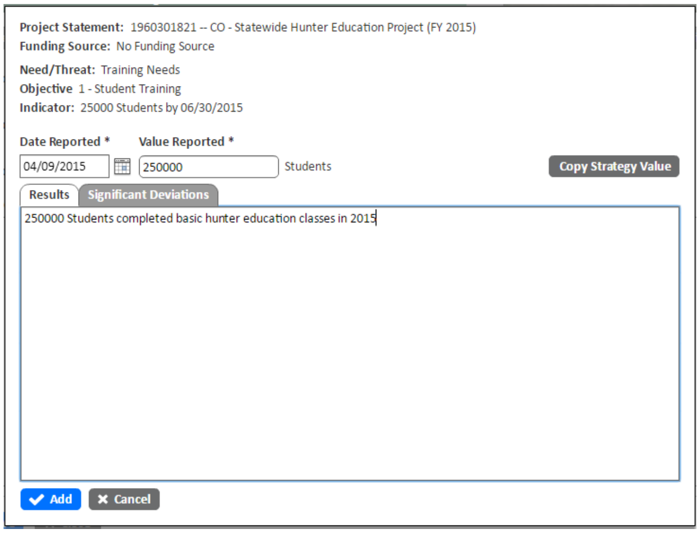


Action Objectives Addressed Tab

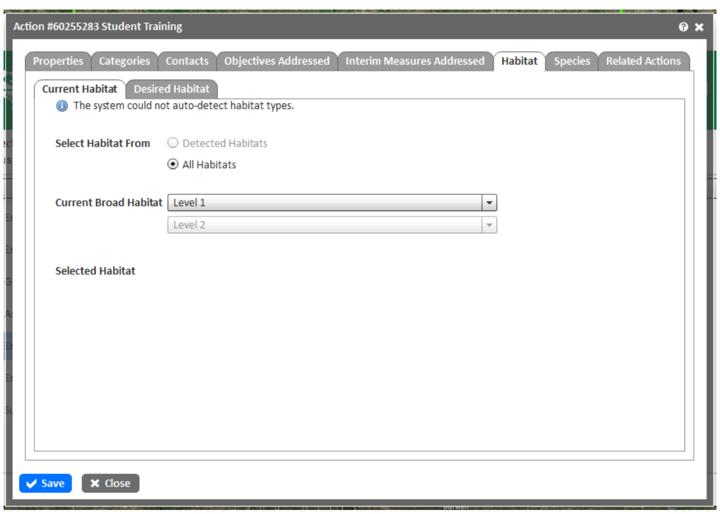
17. Select a **Project Statement** from the drop down list
18. Select an **Objective** from the drop down list
19. Select an **Indicator** from the drop down list



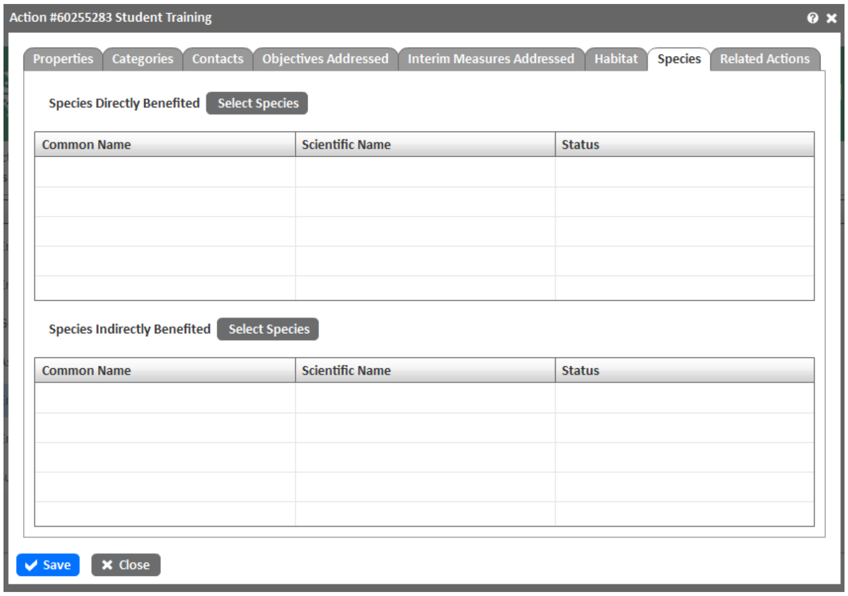
20. When the pop-up window appears, complete:
    - **Date Reported**
    - **Value Reported** (use **Copy Strategy Value** button on right to copy the value originally entered in the objectives)
    - **Results:** enter narrative of results
    - If an empty box appears on the right, select "True" or "False" from the drop down (appears with qualitative indicators only and is used to determine if the objective was completed)
    - Click over to the **Significant Deviations Tab** to add items, if necessary.
    - Click the **Add** button to add the progress report.



21. Click the **Save** button to save the **Action** form. Click the **OK** button to confirm.
22. Interim Measures Addressed Tab (optional - see the Interim Measures section)
23. Habitat Tab – fill out if applicable
    - Select the **Current Broad Habitat** from drop down list on the **Current Habitat Tab** (e.g. Desert Scrub).
    - Select the **Desired Broad Habitat** from drop down list on the **Desired Habitat Tab**

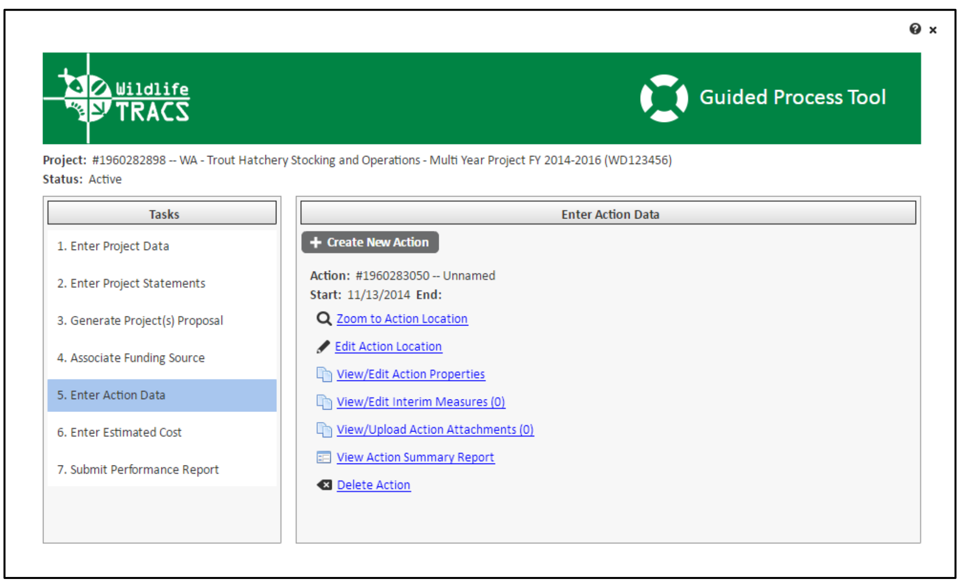


24. Species Tab – fill out if applicable
    - In the **Directly** or **Indirectly Benefitted Species** sections click **Select Species.** Search for the species and add by clicking the plus sign.



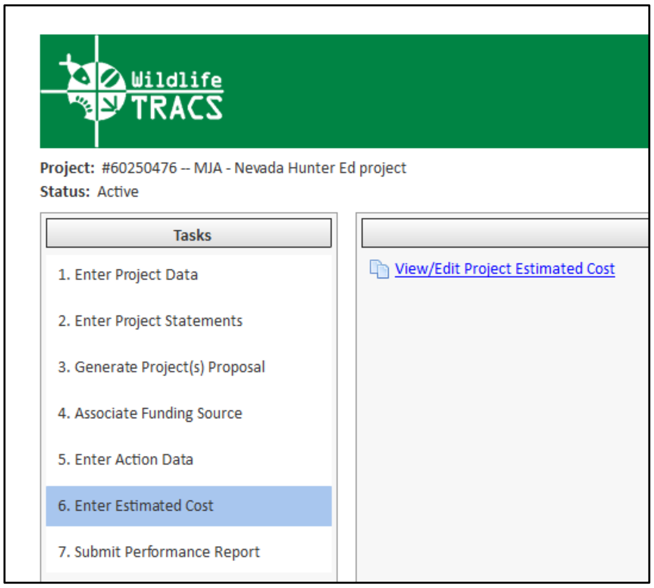
25. **Related Actions Tab** – fill out if applicable to display relationships with parent or related actions.

26. Click **Save** and **Close** to return to the Guided Process Tool. Use the buttons on the right to view, edit, delete or attach attachments to the action.

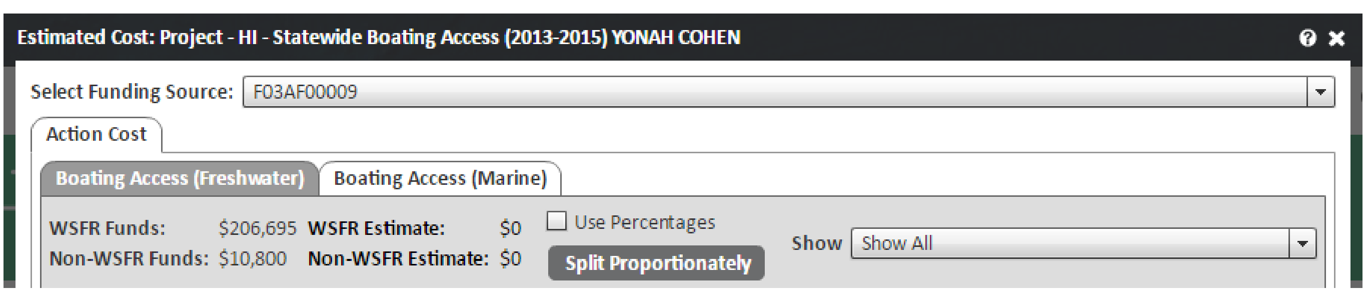


Lesson 9: Entering Estimated Costs

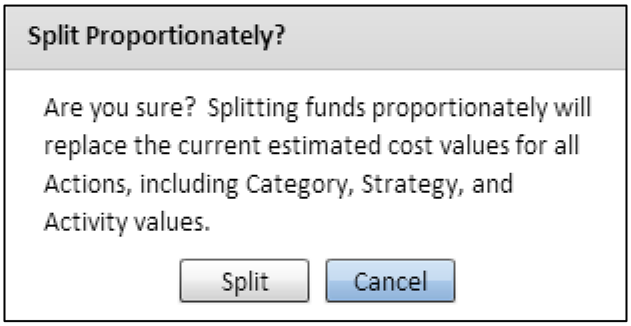
1. Click 6. Enter Estimated Cost link located in the Tasks panel of the Guided Process Tool. Click the Edit Project Estimated Cost link located in the right panel.



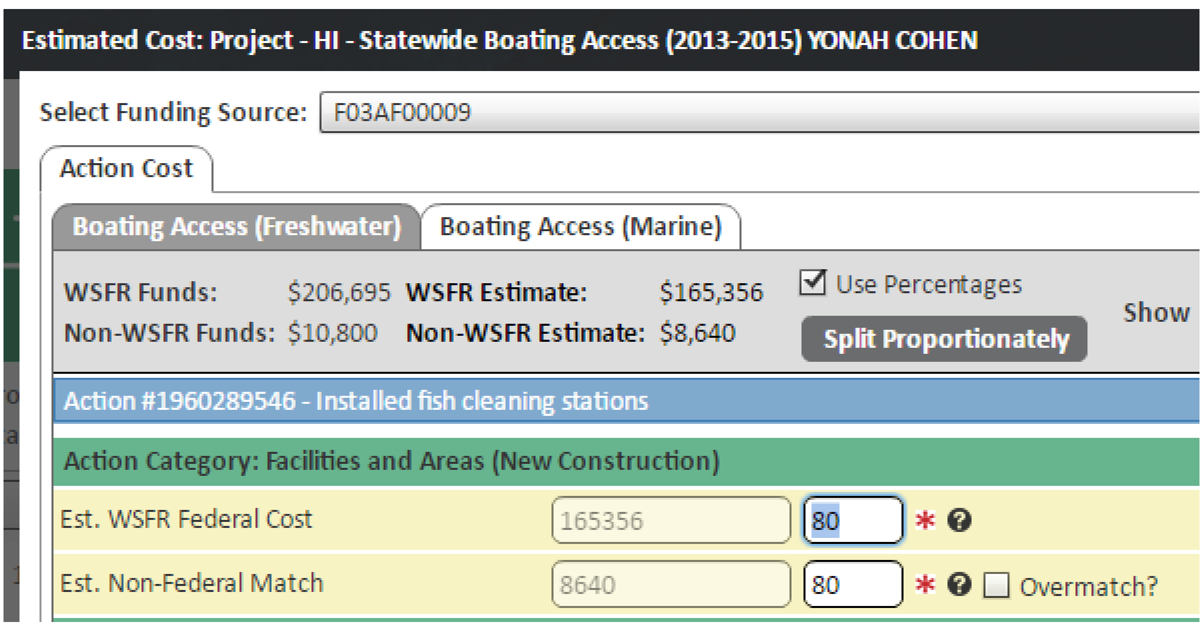
2. The estimated costs table appears. Estimates are entered here by action. It is important to keep in mind that these are <u>estimates only</u> and are NOT AUDITABLE. Auditable fiscal records are kept in FBMS.
   - If the project has more than one funding source, enter the estimates for each funding source by selecting them from the Funding Source drop down.
   - The grant program will appear as a tab in the Action Cost section. If there are multiple grant programs funding the project, they will appear as separate tabs that will need to be filled out.
   - The WSFR Funds and Non-WSFR Funds will appear in the top of the box.
   - Use the Show box (right side) to view all actions or select a specific action from the menu.



3. For each action (blue line), enter the estimated cost breakdown of **Est. WSFR Federal Cost** and **Est. Non Federal Match** applied to that action at the Category level.
    - Cost estimates breakdowns at the Strategy and Activity levels (sections in green) are optional.
    - To apportion costs evenly between all actions and Category, Strategy and Activity levels, click the **Split Proportionately** button and click **Split.** (Note: There is no undo button, so incorrect amounts will need to be updated manually).



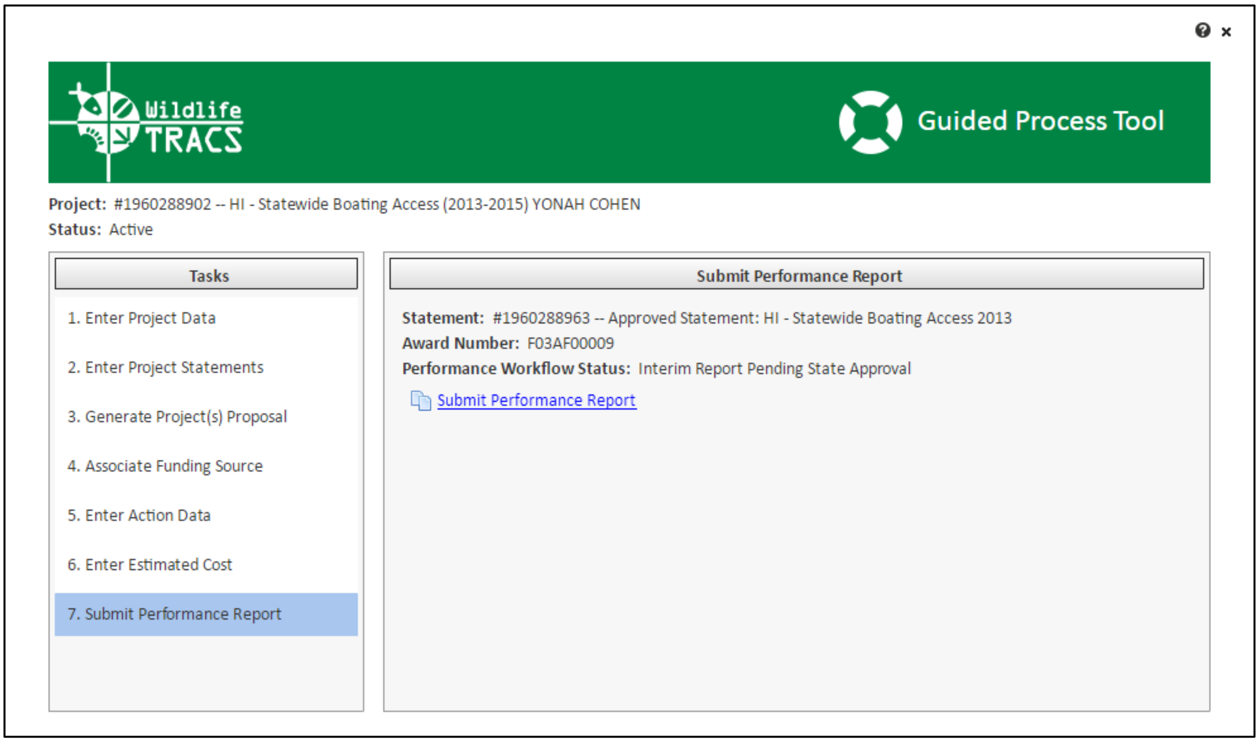
    - To use custom percentages, check the **Use Percentages** button. A small box will appear to right of the amounts to enter a percentage.



4. After entering the costs for all actions, click the **Save** button to save the Estimated Costs form.
5. Click the **Close** button.

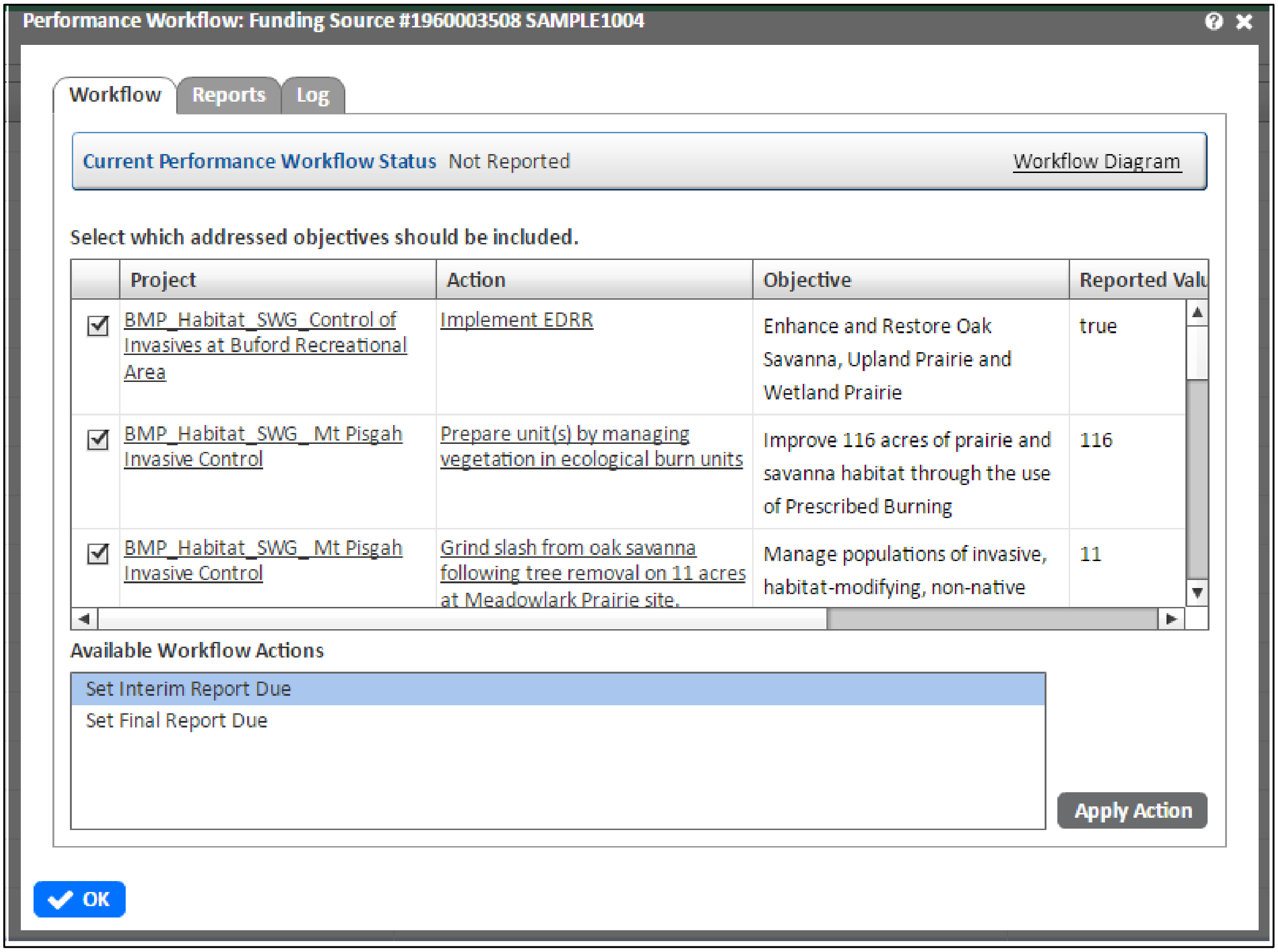
Lesson 10: Submitting your Performance Reports

1. Open the **Guided Process Tool** for the project. On the left side, select **7: Submit Performance Report.** From the right panel, select **Submit Performance Report.**

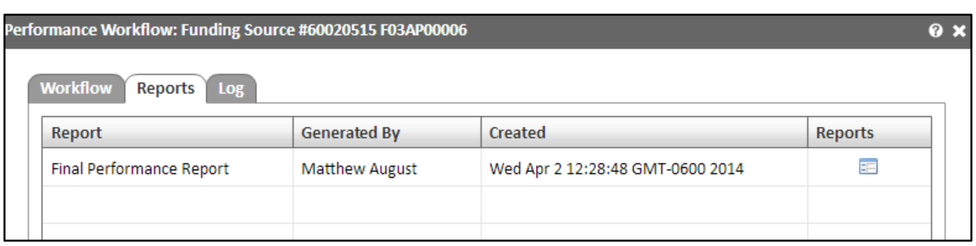


2. The current Performance Workflow Status box will display the current status starting as **Not Reported**. It is necessary to select which **Addressed Objectives** should be included. Place a checkmark in the boxes next to all of the objectives to be included in the performance report.

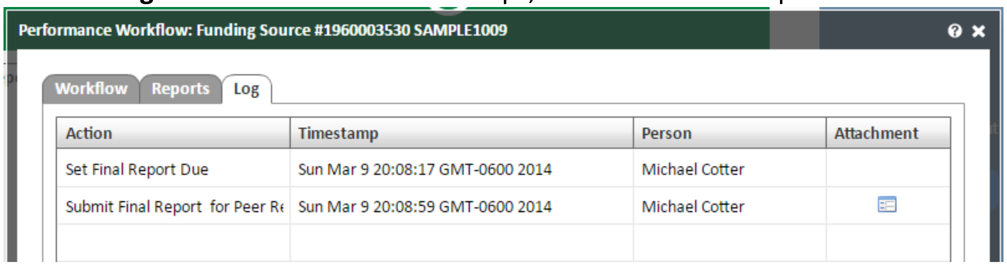
3. From the **Available Workflow Actions** box (lower half of the screen), select the appropriate report as due and click the **Apply Action** button.
   - Select **Set Interim Report Due** for each year except the last year in a multi-year project.
   - Select **Set Final Report Due** when the final report is due (such as for a single year project or for the last year in a multi-year project).



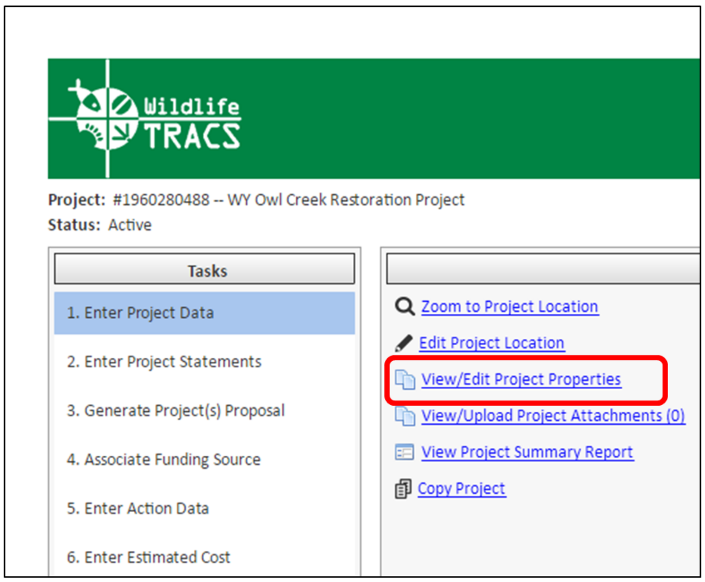
4. Check the boxes for the objectives to include in the performance report. Select the next step in the **Available Workflow Actions** box and click **Apply Action** to continue pushing the report through the workflow.
    - Your role within the TRACS application may allow you to initiate, review, or approve performance reports. Whatever the role, use the **Available Workflow Actions** box to advance the performance report through the workflow.
    - Select the **Reports Tab**, and then click the icon in the **Reports** column to view the report.



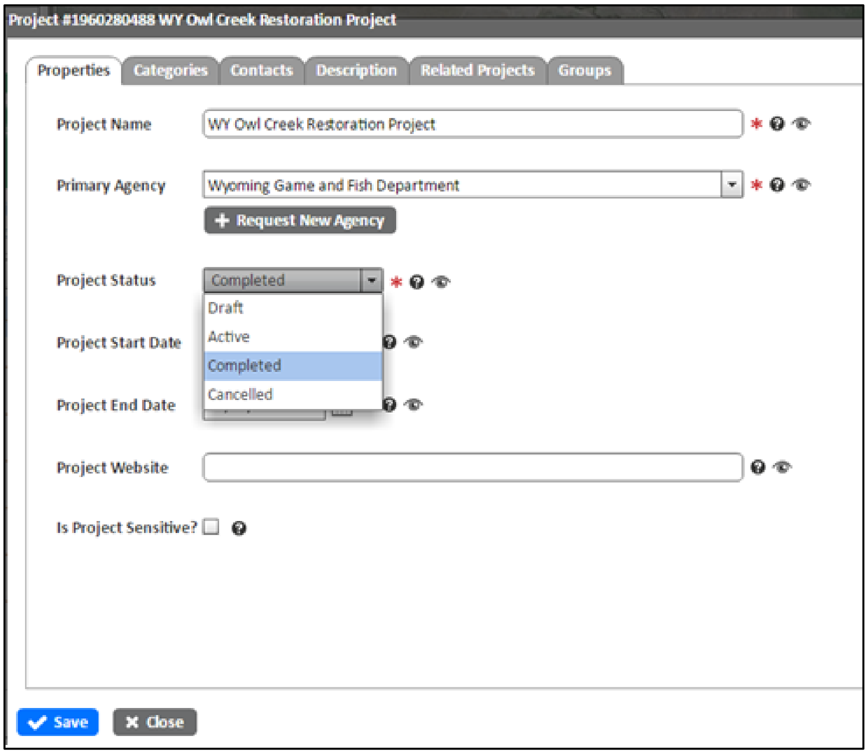
- Click the **Log** tab to view the workflow steps, and who has accomplished each.



5. Once the status is **Final Report Approved by WSFR**, the user who created the project will need to go back into the Guided Process Tool to mark the project as "complete**"**. From the Guided Process Tool, select **1 Project Data** on the left side. Then select **View/Edit Project Properties** on the right side.



6. In the Project Status box, select **Completed.** Then click **Save** and **Close**.



Lesson 11: Advanced Mapper Tools

This chapter contains content for Lesson 11 Advanced Mapper Tools which covers some additional functionality in TRACS that is not required to enter a basic project.

These include:

11.1 Mapper Navigation Tips
- Mapper Toolbar
- Navigation Toolbar
- Feature Editor (Left Side Dock)
- Layer Manager (Right Side Dock)

11.2 Adding Map Layers
- TRACS Layers
- Reference Layers
- Organize Layers
- Map Legend

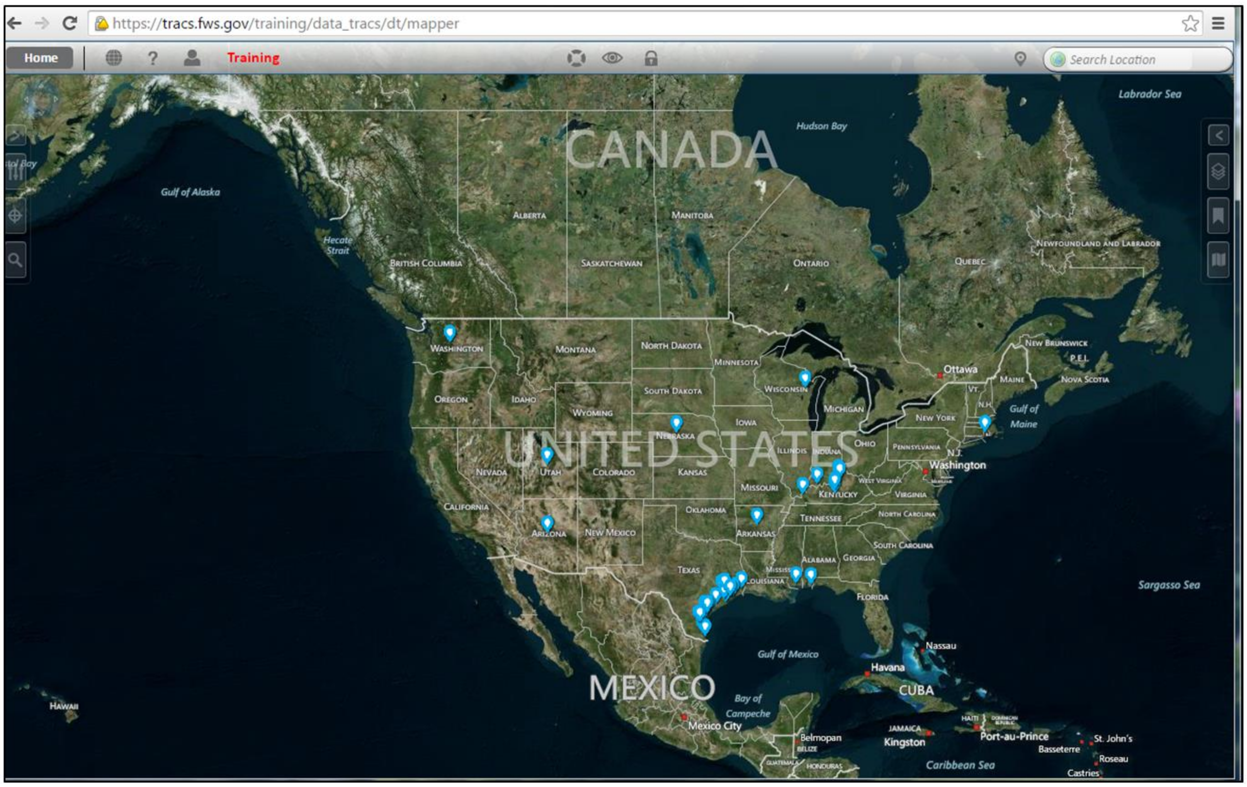
11.3 Managing Filters

11.4 Bookmarks

11.1 Mapper Navigation Tips

Mapper Toolbar

The **TRACS Mapper** allows end-users to view and manage project data in a geographic context. The data created in the **Mapper** identifies the specific geographic location of **Plans**, **Projects**, and **Actions**. By default, blue project points appear first on the mapper and boundaries appear at a closer zoom scale.



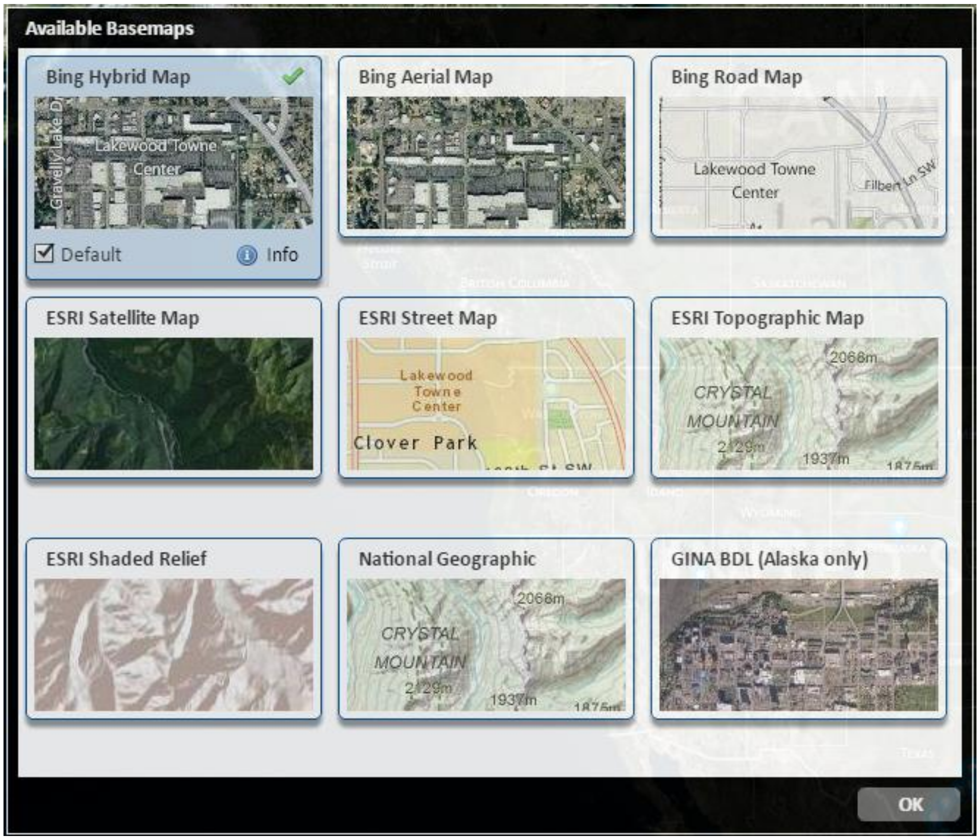
The toolbar located in the top middle of the **Mapper** is referred to as the **Mapper Toolbar**. The toolbar is dimmed by default until the mouse cursor hovers over it.

The components of the **Mapper Toolbar** are listed below with a brief description.

The home button returns end-users to the **TRACS Dashboard**.

 The globe icon displays a list of **Available Basemaps** in TRACS.

- The **Bing Hybrid** map is visible by default. Basemaps are used to display specific location by features and characteristics. For example, a road basemap reflects the features (small-scale) and characteristics of roads for a specific location. A topographic basemap reflects the features (large-scale) and characteristics present at a specific geographic location (e.g. elevation).



 **Help Desk**. End-users can submit a help desk request to the TRACS support team.

 **Logs out** of TRACS and end the current session

 **Guided Process Tool** guides an end-user through the data entry workflow.

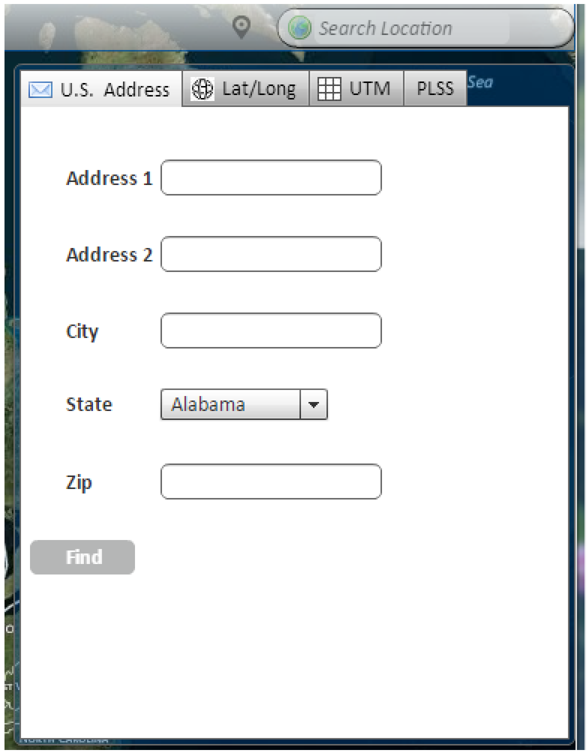
 **Identify Visible Map Features** allows end-users to view summary information for map features that are visible on the map.

**Toggle Map Navigation** allows end-users to lock the basemap so it does not move when using the cursor to draw a feature.

 **Reverse Geocode** allows end-users to obtain geographic coordinates and street address for a specific location.

Search Location allows end-users to search for specific geospatial location by street, address, latitude / longitude, survey data, street address, county, state, etc.

- Clicking on the **globe icon** (within the search bar) allows users to enter more detailed search criteria by U.S. Address, Latitude/Longitude, UTM or PLSS.



Navigation Toolbar

The **Navigation Toolbar** is located in the upper left hand corner under the **Mapper Toolbar**.

The components of the navigation tools are listed below with a brief description:

- **Pan mode** allows end-users the ability to grab and move the map in any direction by left clicking on the map.
- **Zoom I**n allows end-users to zoom in on a particular map area by drawing a box.
- **Zoom Out** allows end-users to zoom out on the map by drawing a box.
- **Show Map Scale** allows end-users to toggle the map scale located at the center bottom of the basemap.
- **Show Mouse Coordinates** displays the latitude/longitude at the end-user's mouse cursor location.
- **Show Overview Map** allows end-users to view a world street map superimposed on the current basemap. This is useful for determining street location when viewing satellite imagery.
- Feature Editor and Explorer Toolbar
- The tools located on the far left side of the **Mapper** are referred to as the **Feature Editor Dock**.

Feature Editor (left side dock)

The components of the **Feature Editor Dock** are listed below with a brief description:

- **Restore Dock** opens and minimizes the **Feature Editor** and **Feature Explorer** tools.
- **Feature Editor** allows end-users to create and edit **Plans, Projects**, and **Actions**.
- **Feature Explorer** allows end-users to navigate, browse, and edit data including **Plans, Projects**, and **Actions**.
- **Feature Search** allows end-users to search for existing **Plans, Project, or Actions**. Searches can be performed using the feature name or ID number.

Layer Manager (right side dock)

- The dock located on the far right side of the **Mapper** is referred to as the **Layer Manager toolbar**.

The components of the **Layer Manager toolbar** are listed below with a brief description.

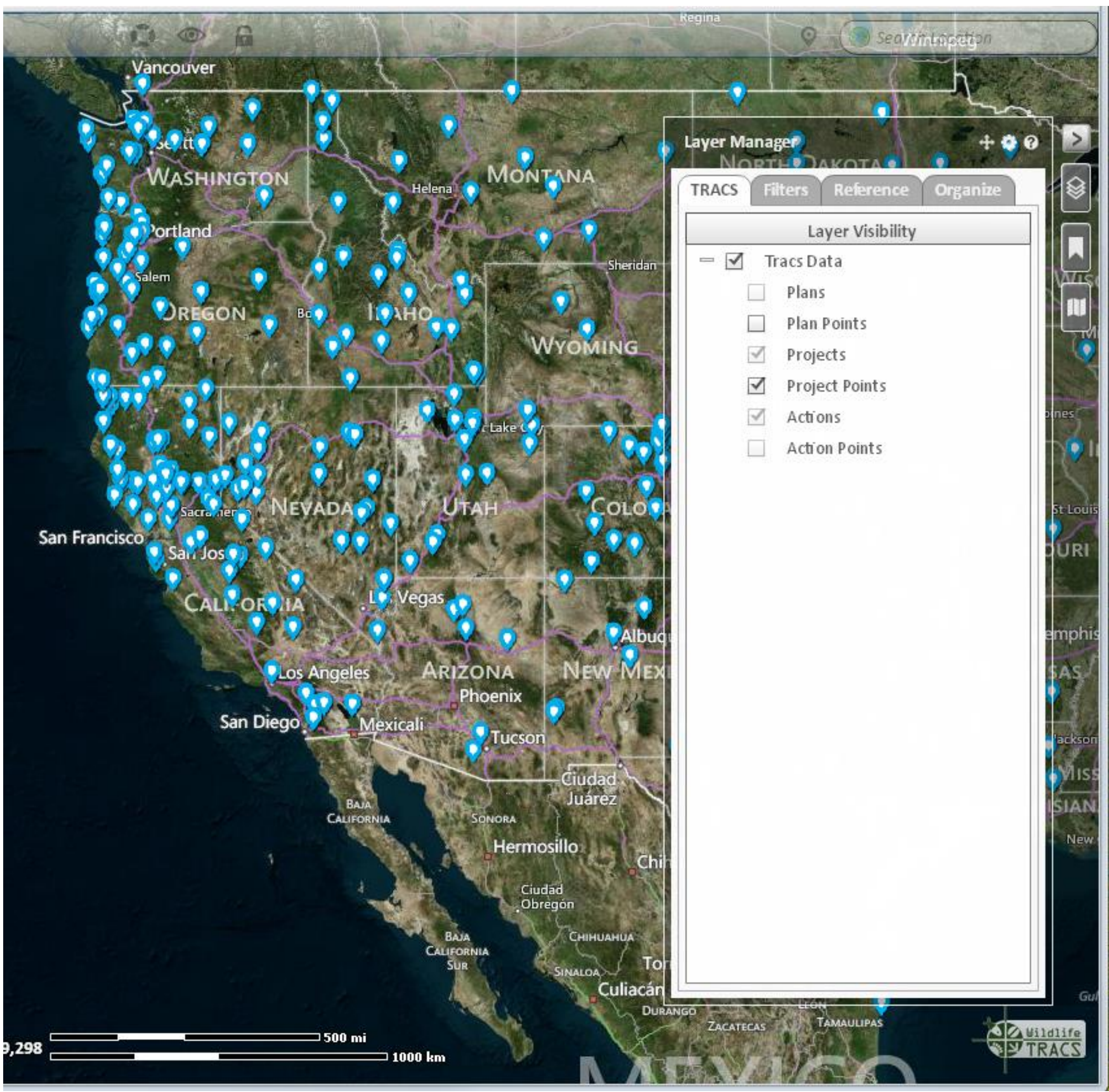
- **Restore Dock** opens or closes the dock.
- **Layer Manager** allows end-users to control filters and the visibility of reference layers (e.g. external datasets and TRACS features) on the **Mapper**.
- **Bookmarks** allow end-users to bookmark geographic locations for quick reference in the future (e.g. project location, region, state, county). **Bookmarks** are specific to an individual user account.
- **Map Legend** allows end-users to view symbology and labels for reference layers and TRACS features. Specific colors and shapes are used to identify items of interest (e.g. habitat types).

11.2 Adding Map Layers

TRACS Layers

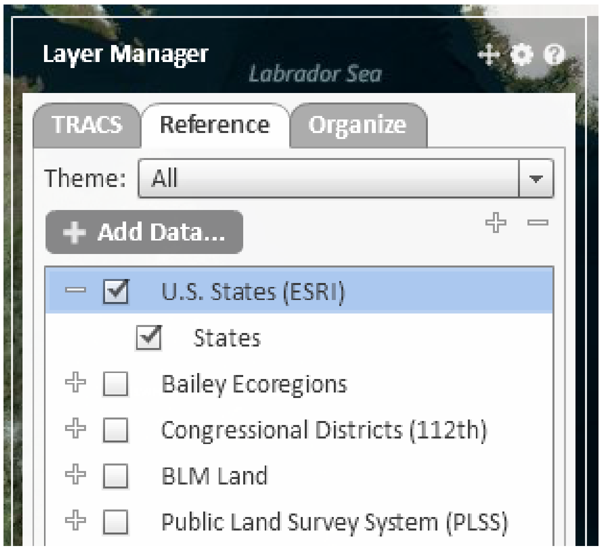
The first tab in the Layer Manager dock (right side) is the TRACS tab. TRACS Data is the default source layer.

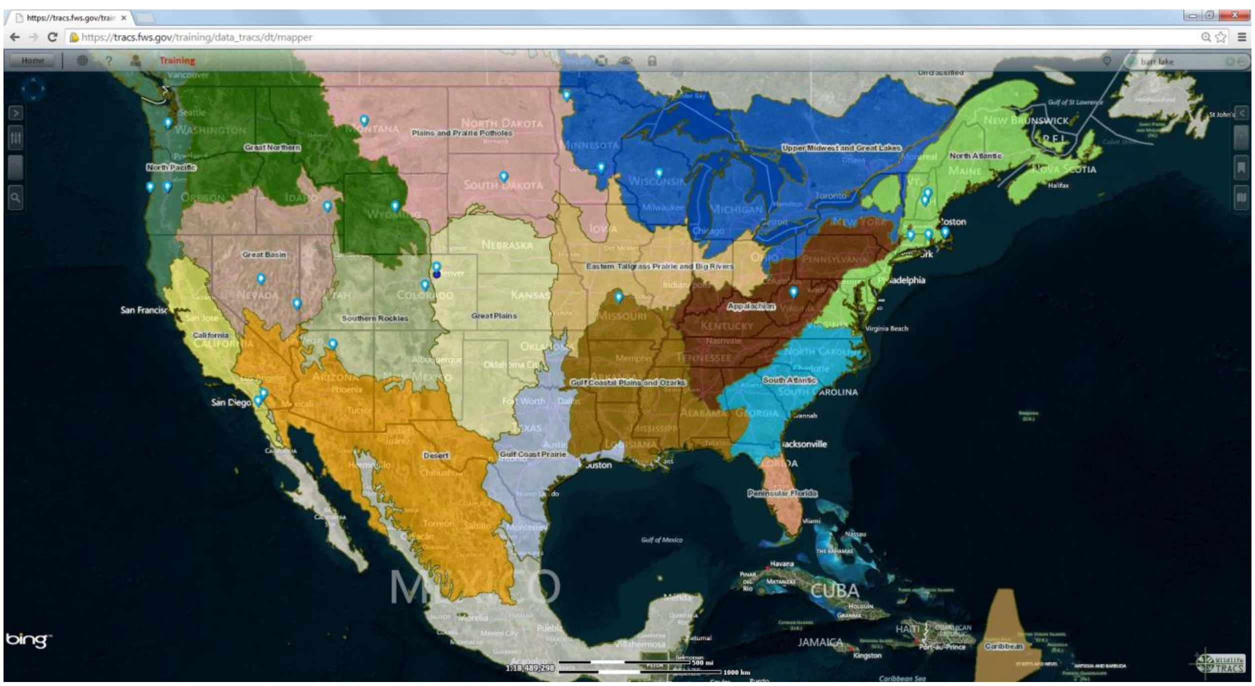
Click on the next to TRACS Data to expand the section. Check or uncheck (toggle click) the boxes to view Plans, Plan Points, Projects, Project Points, Actions and/or Action Points. If a box appears in grey, it is not visible at the current scale.



Reference Layers

Reference layers can assist with creating features like Plans, Projects, and Actions. Click the **Reference** tab. Click the (+) sign using the left button on your mouse to expand available layers. For example, to view state boundaries, check the box by U.S. States and click the + sign to select States.

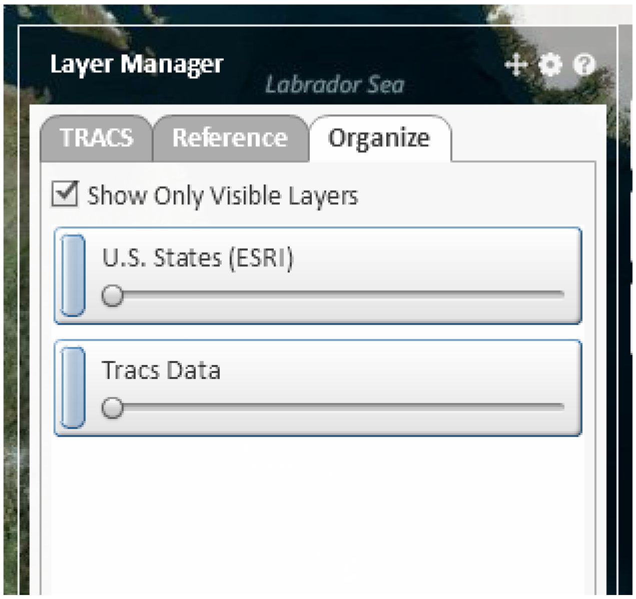




Reference Layers List	
U.S. States (ESRI)	State boundaries from ESRI (Environmental System Research Institute)
Bailey Ecoregions	Ecoregions are ecosystems of regional extent. Bailey's ecoregions distinguish areas that share common climatic and vegetation characteristics. http://nationalatlas.gov/mld/ecoregp.html
Congressional Districts (112th)	Displays congressional districts for the 112th United States Congress, symbolized by the political party of the district's representative (Democrat blue, Republican red).
BLM Land	Displays Bureau of Land Management areas including National Conservation Areas, National Monuments, Wilderness Areas, Lands, Lands Dissolved and Bankhead Jones (farm tenant purchase program).
Public Land Survey System (PLSS)	The Public Land Survey System (PLSS) is a way of subdividing and describing land in the United States. All lands in the public domain are subject to subdivision by this rectangular system of surveys, which is regulated by the U.S. Department of the Interior, Bureau of Land Management (BLM). It encompasses major portions of the land area of 30 southern and western States. The PLSS typically divides land into 6-mile-square townships, which is the level of information included in the National Atlas. Townships are subdivided into 36 one-mile-square sections. Sections can be further subdivided into quarter sections, quarter-quarter sections, or irregular government lots. http://www.nationalatlas.gov/articles/boundaries/a_plss.html
FWS Cadastral Dataset	Datasets that depict USFWS approved acquisition boundaries and managed lands. National Wildlife Refuges (>3M), Wetland Management Districts, Naitonal Wildlife Refuges (<3M), Waterfowl Production Areas.
FWS Joint Ventures	Displays boundaries and names for FWS Joint Ventures (i.e. partnerships of agencies, organizations, corporations, tribes, or individuals that conserve habitat for priority bird species, other wildlife, and people). http://www.fws.gov/birdhabitat/JointVentures/index.shtm
FWS Landscape Conservation Co-op (LCC)	LCCs are areas that designate applied conservation science partnerships with States, Tribes, Federal agencies, non-governmental organizations, universities and other groups. http://www.fws.gov/landscape-conservation/lcc.html
FWS Regions	Displays the boundaries for the 8 regions and D.C. headquarters for the U.S. Fish and Wildlife Service.
FWS Refuges	Displays FWS Wildlife Refuge locations, labels and boundaries.
National Hydrography Dataset	The National Hydrography Dataset (NHD) and Watershed Boundary Dataset (WBD) are used to portray surface water on The National Map. The NHD represents the drainage network with features such as rivers, streams, canals, lakes, ponds, coastline, dams, and streamgages. The WBD represents drainage basins as enclosed areas in eight different size categories by HU (Hydrologic Unit). http://nhd.usgs.gov
NatureServe Endangered Species	Displays Endangered Species counts by status, county, and/or watershed. NatureServe represents a network of independent centers that collect and analyze data about the plants, animals, and ecological communities of the Western Hemisphere. http://explorer.natureserve.org/statusus.htm
Nature Serve Habitat Types	Displays Habitat Types defined by NatureServe.
Soil Survey (SSURGO)	The SSURGO database contains information about soil as collected by the National Cooperative Soil Survey over the course of a century. http://www.nrcs.usda.gov/wps/portal/nrcs/detail/soils/survey/?cid=nrcs142p2_0536277
Alaska (GINA)	Geographic Information Network of Alaska (GINA) Best Data Layer (BDL) developed by the University of Alaska. The GINA layers include rivers, wetlands, hydrologic units, statewide parcels and Kenai parcels. http://www.gina.alaska.edu
TRACS Data	The default layer displays projects, project points and actions, but can also include plans, plan points and action points.

Organize Layers

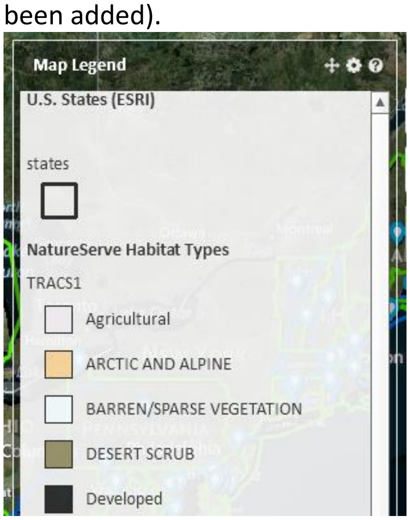
Click the **Organize Tab** to arrange layer order (drag and drop to rearrange) and modify layer transparency with the sliding bar. Layers on the map are less opaque as the transparency increases. Slide right for more translucent or left for more opaque/visible. Repeat the process to display additional reference layers.



Map Legend

Click the **Map Legend** button from the **Right Toolbar.**

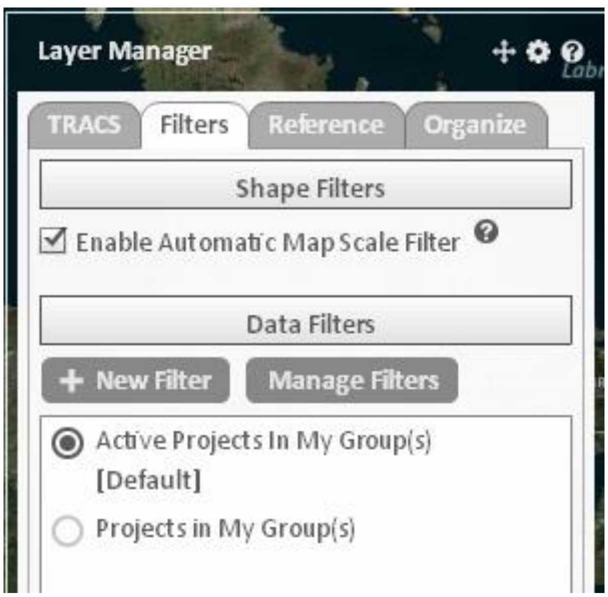
Use the **Legend Tool** to determine what the shaded colors represent (will only display if layers have been added).



11.3 Managing Filters

The second tab in the Layer Manager dock (right side) is the Filters tab. This tab allows users to manage and create new filters.

- The **Enable Automatic Scale Filter** (checked by default) is used to hide shapes that are either too small or too large to fit inside the current map window.
- The system filters include **Active Projects in My Group(s)** (the system default filter) and **Projects in My Group(s)**.
- The **New Filter** button allows users to create a new filter.
- The **Manage Filters** button allows users to manage filters, including selecting active and default filters.

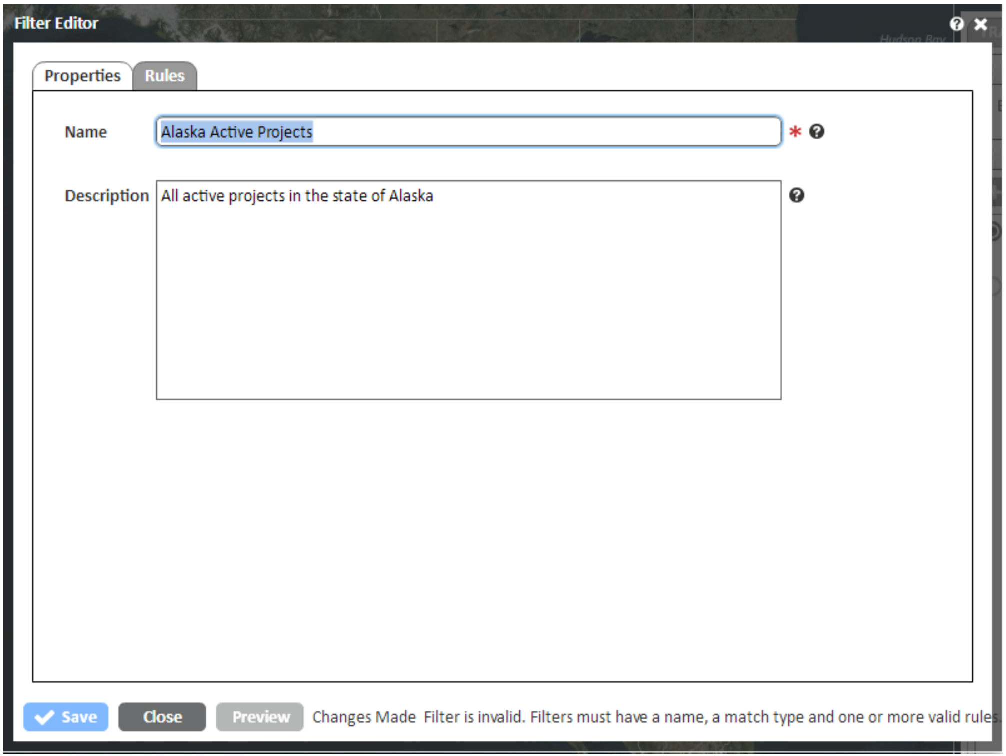


Create a New Filter

1. Select the New Filter button 

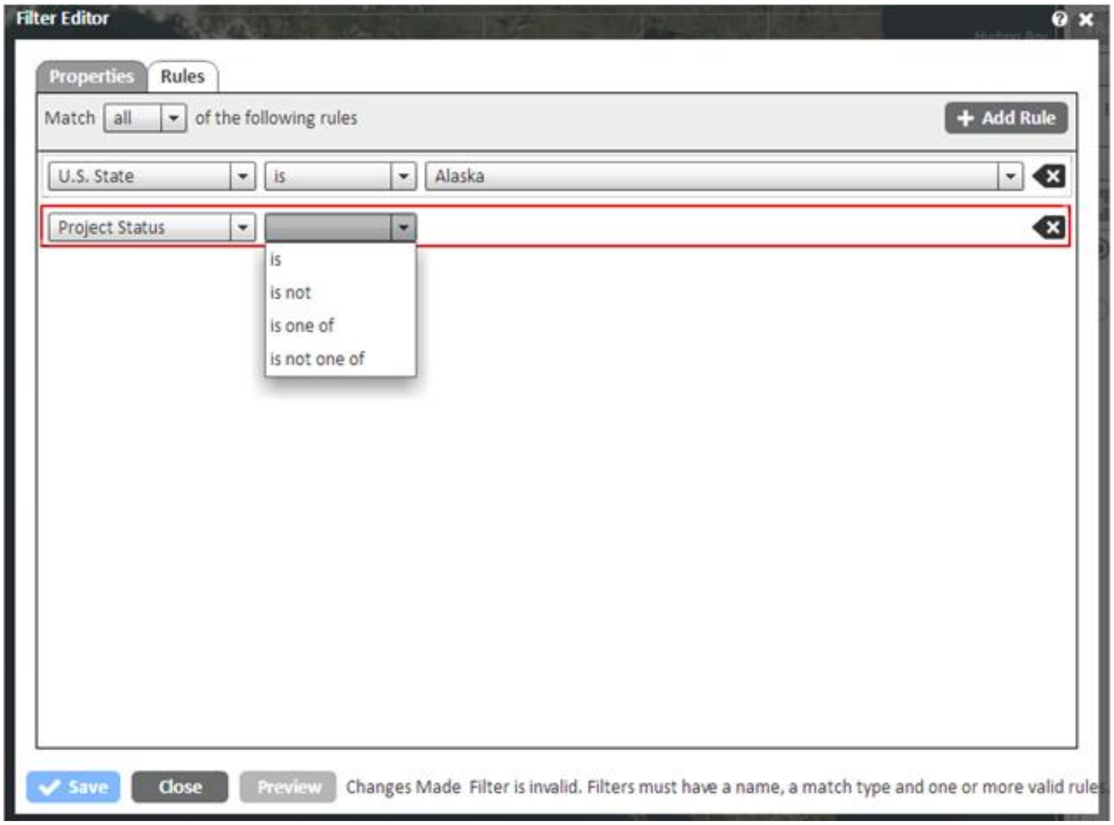
 to open the Filter Editor window.

2. On the Properties tab, enter a name for the filter. A description is optional.

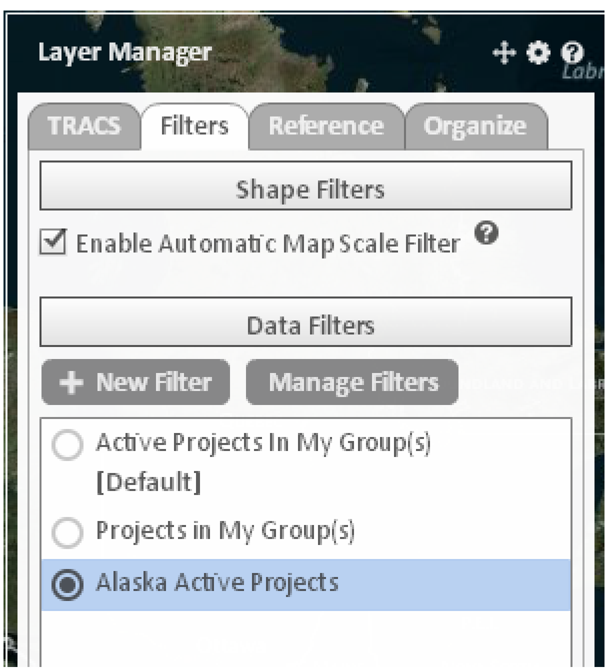


3. Select the **Rules** tab. In the Match box, select the rule to match **all** or **any**. Click **Add Rule**.

4. Select the filter category from the first box, the rule from the second box and the filter value from the third box. Click **Add Rule** to add another rule or click to remove the rule. Then click **Save** and **Close.**



The new filter will be displayed on the main Filters tab. Select the filter to view (only one filter can be active at a time).

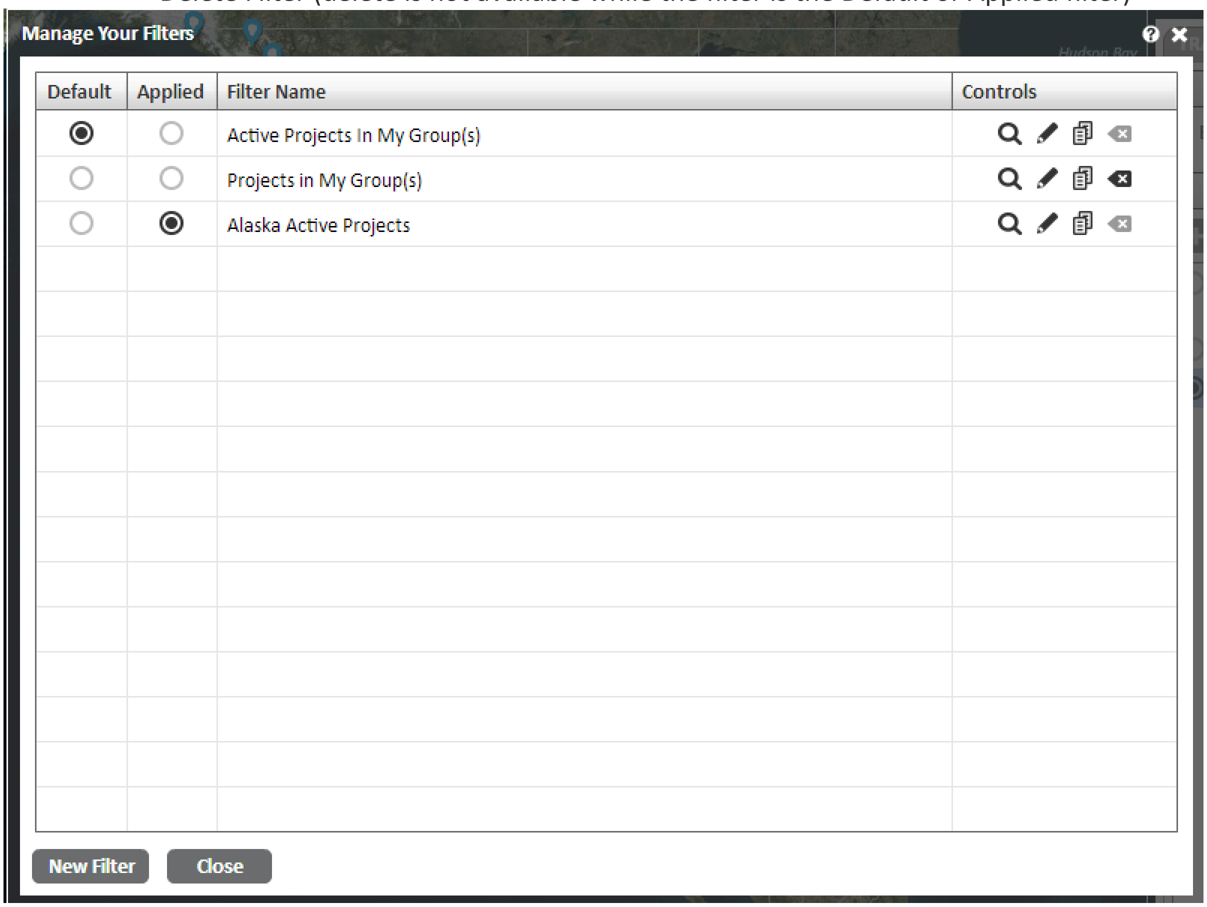


Manage Filters

The Manage Filters button opens the window. Select the **Default** button to make a filter the default.

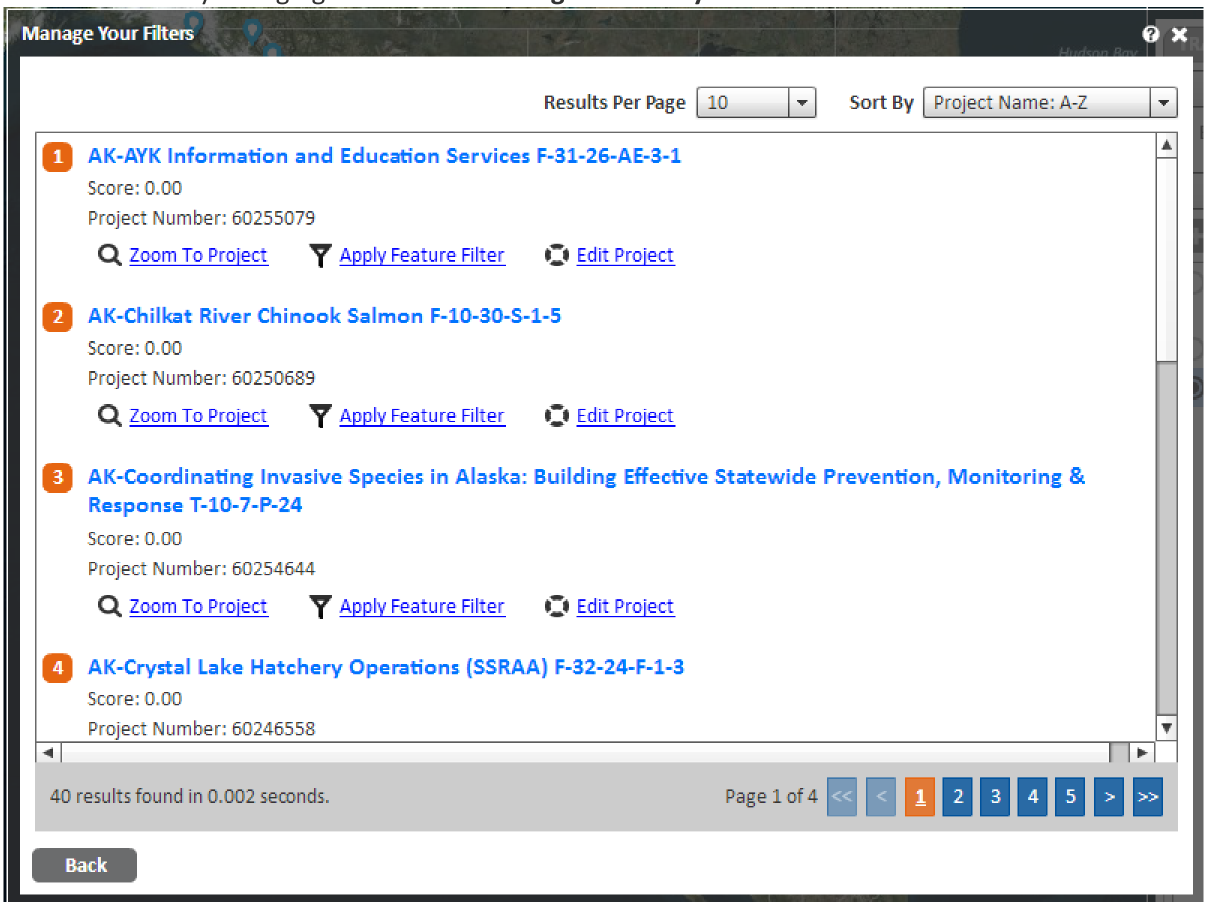
Select the **Applied** button to apply that filter (only one filter can be applied at a time).
The Controls (right side) include:

- Preview Filter
- Edit Filter
- Copy Filter
- Delete Filter (delete is not available while the filter is the Default or Applied filter)



Preview Filter

The Preview button allows the user to view a list of projects that meet the filter rules. The view can be customized by changing the **Results Per Page** or **Sort By**.

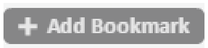


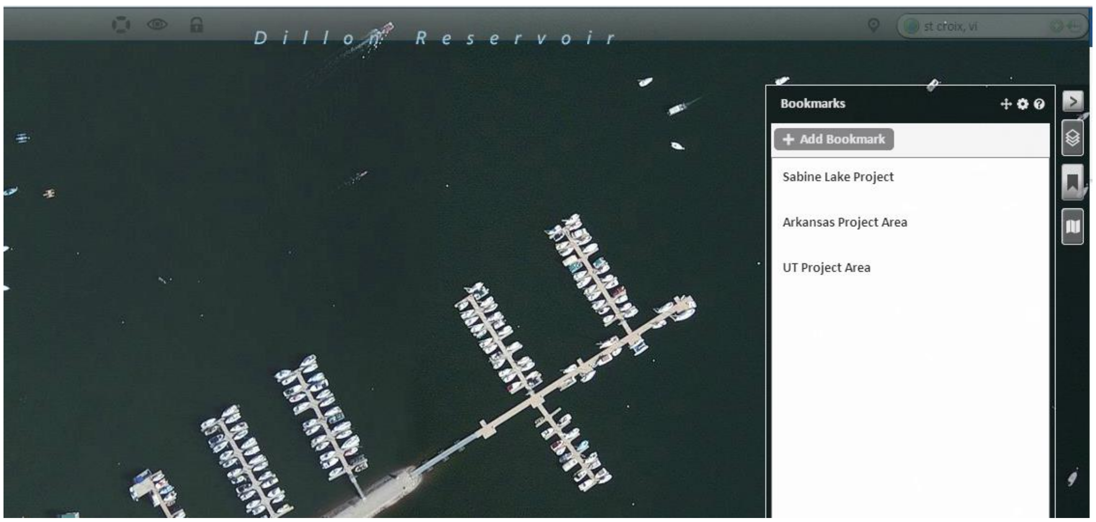
Below each project are links to **Zoom to Project** (zooms the map to the project), **Apply Feature Filter** (creates a filter to view only that project) and **Edit Project** (opens the Guided Process Tool). Legacy Projects will only have the **Edit Project** Link.

11.4 Bookmarks

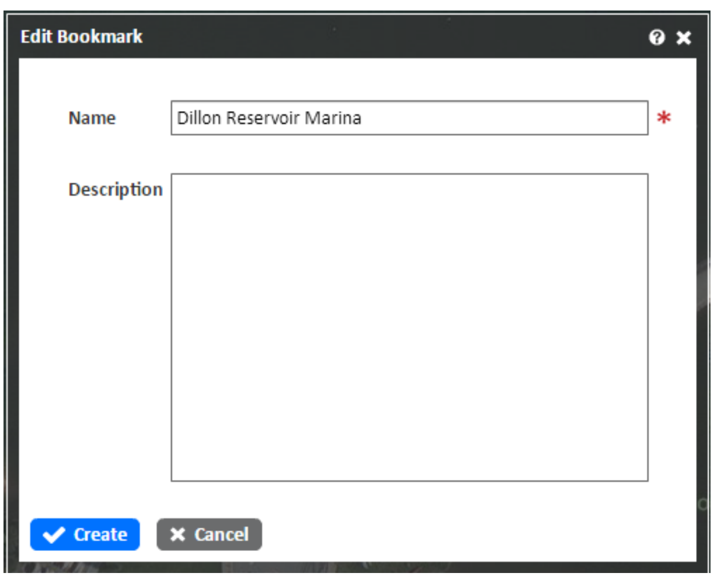
Bookmarks are used to save a geographic location for quick reference in the future (e.g. project location, region, state, county, etc.). Bookmarks are specific to an individual user account.

From the Layer Manager dock, select the Bookmark tab  on the right side bar.

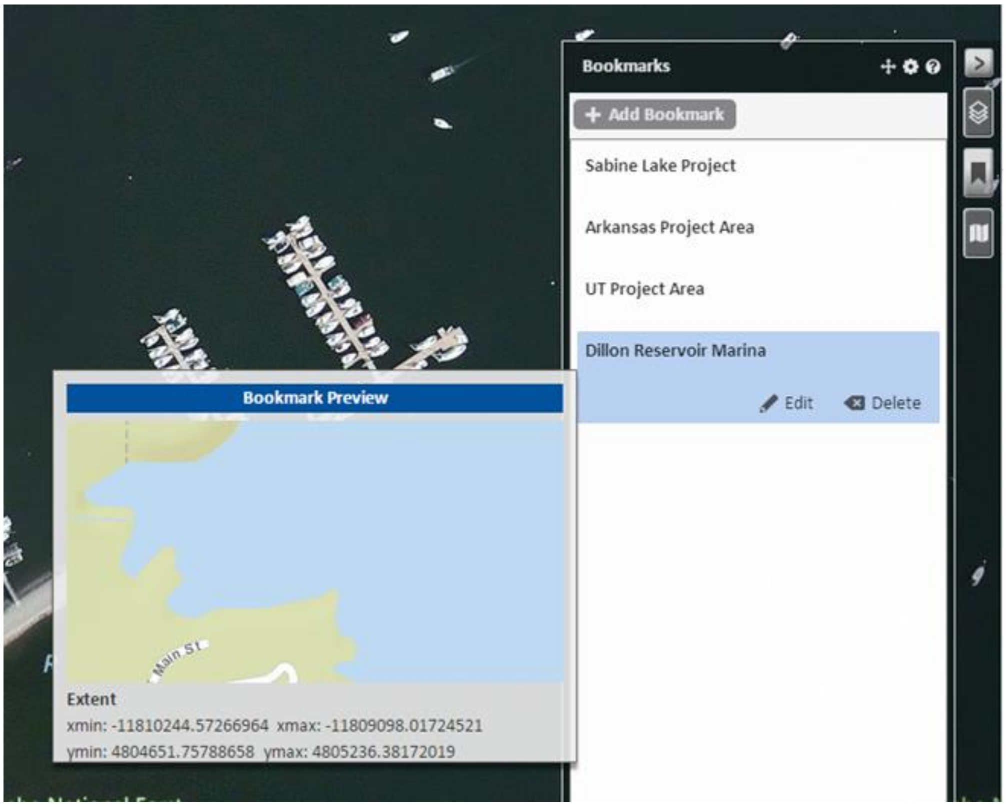
To create a new bookmark, navigate or zoom to the location you would like to bookmark on the map and click 



Enter a name for the bookmark (description optional). Click **Create**.



The saved bookmark will display in the list. Hover over a bookmark to view a Bookmark Preview. Click on the bookmark to zoom to that location and view the Edit and Delete buttons.



Lesson 12: Advanced Shape Editing

This chapter contains content for Lesson 12 Advanced Shape Editing which covers some additional functionality in TRACS that is not required to enter a basic project.

These include:

12.1 Shape Creation and Editing

- Create a Shape
- Open Shape Edit/Replace Window
- Replace a Shape
- Edit a Shape
- Crop or Cut Part of a Shape
- Create a Multi-Shape Polygon
- Buffer a Shape
- Generalize a Shape
- Move a Shape
- Copy the Project Shape as Action
- Update Project Shape to Action Shape
- Show or Hide Sensitive Shape

12.2 Import Shapefiles

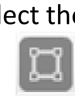
Shape Creation and Editing

When creating a plan, project or action, the location must be mapped (i.e. represented on the map as a polygon).

- The Feature Editor (left side dock) is where the polygon can be mapped and edited.
- The Feature Editor will open automatically when using the Guided Process Tool to create a new project or a new action.

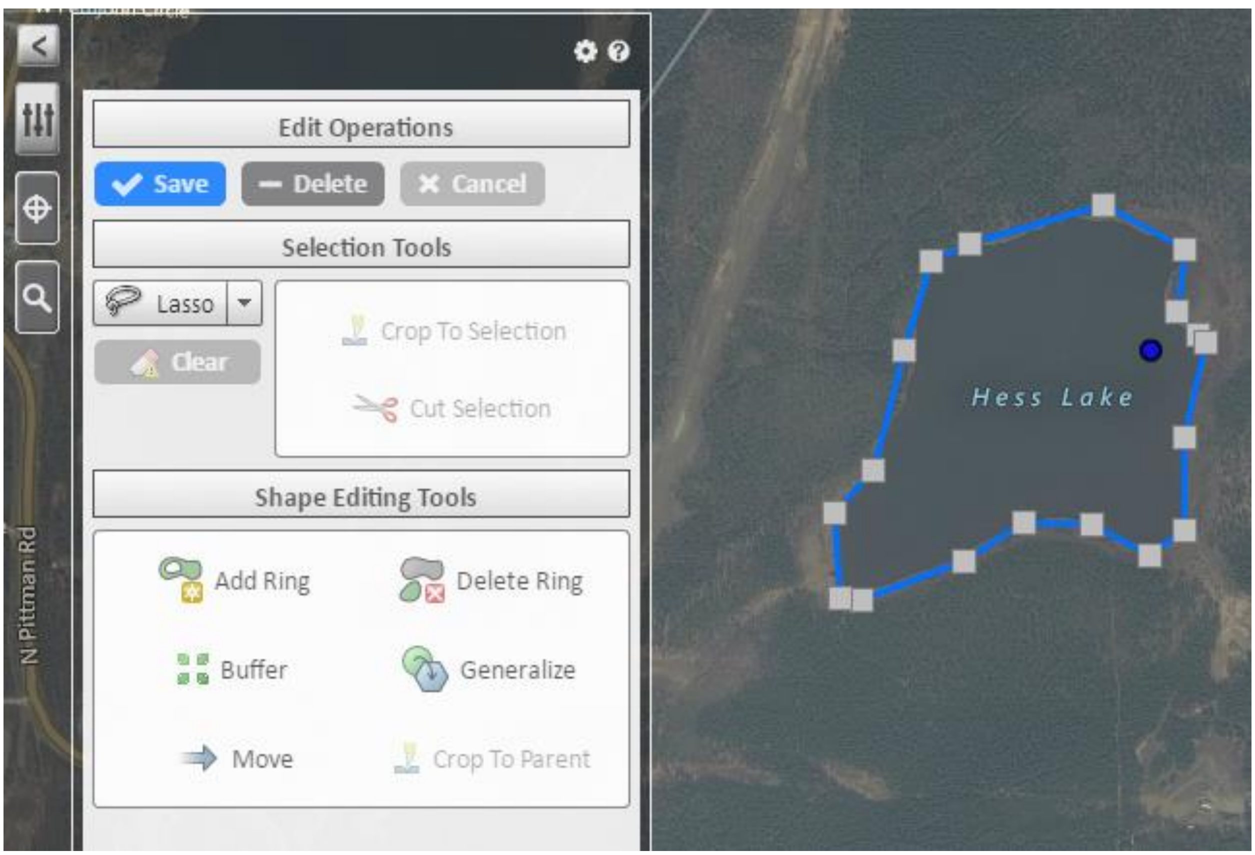
Tip: The Feature drawing tools may be grayed out if the map is "Not at an Editable Scale" (zoom in to an editable scale if needed). An action can only be created if a project is selected first (the project will be displayed as the "active record" at the top of the window).

Create a Shape

1. Select the appropriate feature drawing tool for the Plan, Project or Action:
   -  The **Freehand Polygon** tool allows you to draw the boundary of a polygon in freeform (i.e. a contoured shape). The freehand polygon is created by holding down the left mouse button, outlining the desired location on the map and then releasing the left mouse button.

-  The **Geometric Polygon** tool allows you to draw the boundary of a shape based on fixed vertices and lines (i.e. a linear shape). The geometric polygon is created by clicking and releasing the left mouse of the map to a single vertex. Continue clicking the left mouse button at each change in direction. Double click the left mouse button to complete the polygon.
-  The **Select Existing Boundary** tool (also known as the Geopicker tool) allows you to select a shared shape from a list of pre-determined boundary types (Political, Hydrological, Coastal etc.).
-  The **Import Shapefiles** tool allows you to create Plan, Project, or Action boundaries from data produced by GIS software. The shapefile import tool accepts all local coordinate systems and translates the shape into the flat webmercator map display.

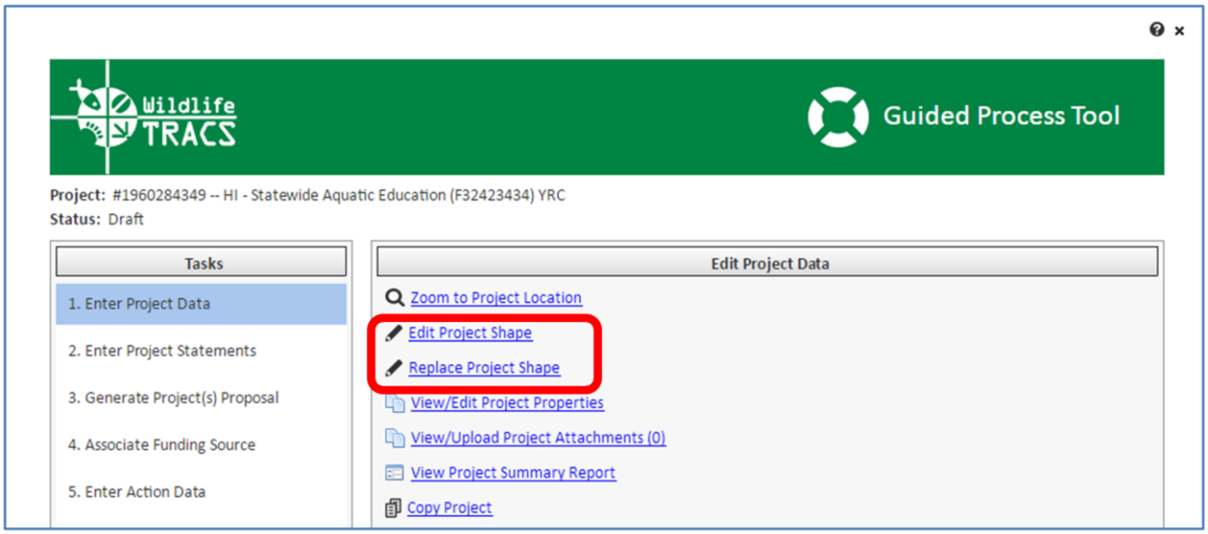
2. Once the shape has been created, click **Save**. If the shape needs to be edited first, see the next section on how to edit or replace a shape.



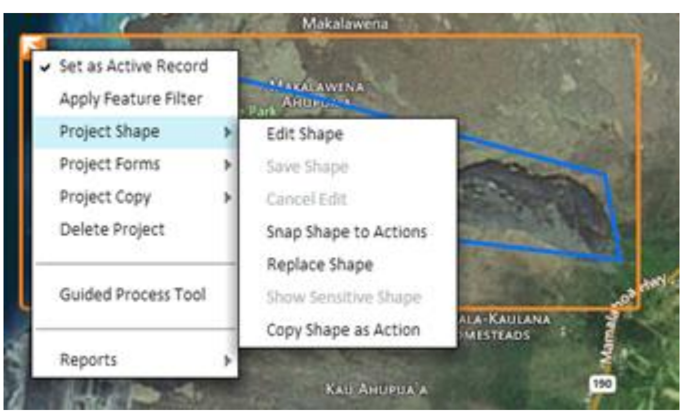
Open Shape Edit/Replace Window

If you have already saved the shape, reopen it using one of the three methods below:

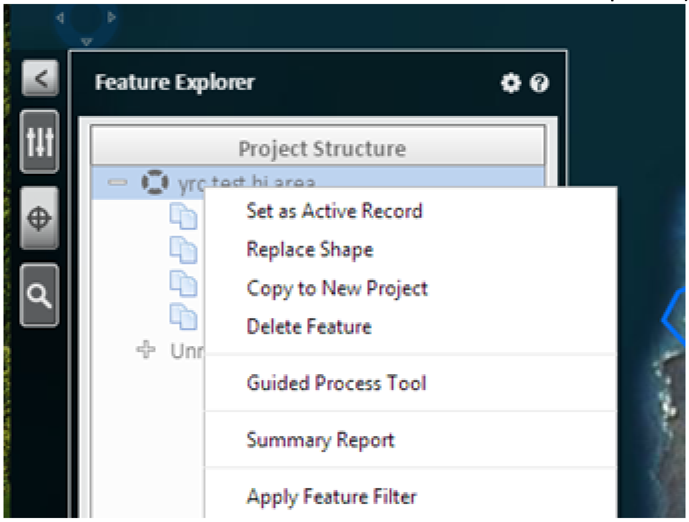
- For a Project or Action, open the Guided Process Tool:
  - **Project Shape:** Select Task 1 Enter Project Data (left side) and click **Edit Project Shape** or **Replace Project Shape**.
  - **Action Shape:** Select Task 5 Enter Action Data and click **Edit Action Shape** or **Replace Action Shape**.



  - Locate the polygon on the map and click inside the shape's boundary to open the orange **Feature Frame** box around it. Click on the arrow in the upper left to open the menu. Select the Shape menu and select **Edit Shape, Replace Shape** or one of the other tools.



- From the Feature Explorer window (left side), **right click** on the name of the plan, project or action to open a menu of similar options. Click **Replace Shape** (or select **Guided Process Tool** to choose from other options).



Replace a Shape

Select **Replace Shape** using one of the methods listed above. The Edit Operations window will open allowing you to create the new shape using any of the feature drawing tools. Once the new shape is saved, it will replace the existing one.

Edit a Shape

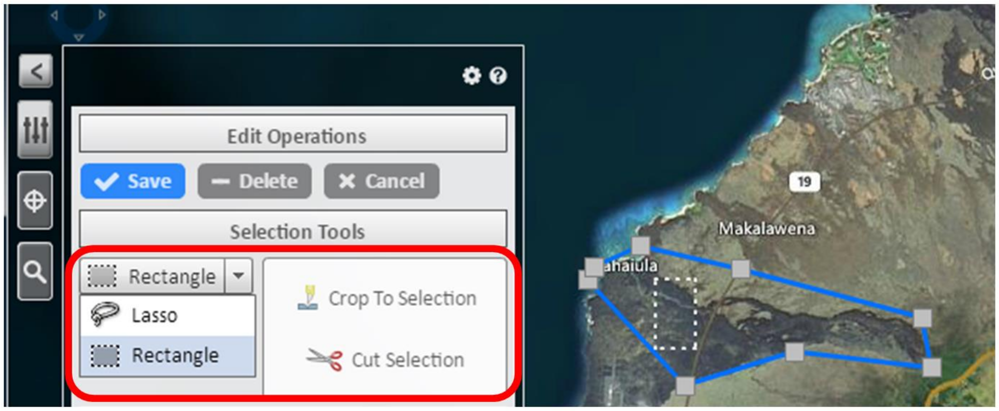
Select **Edit Shape** using one of the methods above in step 1. The Edit Operations window will open. The shape can be edited by using the tools in the window or by editing the shape itself (click on the boundary to move it). The options at the top allow you to Save, Delete or Cancel.

- CAUTION: If you delete a shape, it will delete all the associated data with it (i.e. if you delete the project shape, all associated project data is also deleted).

Crop or Cut Part of a Shape

Click the drop down menu for **Lasso** and select **Lasso** to create a free-form shape or the **Rectangle** to draw a rectangular shape. The shape will flash in black and white.

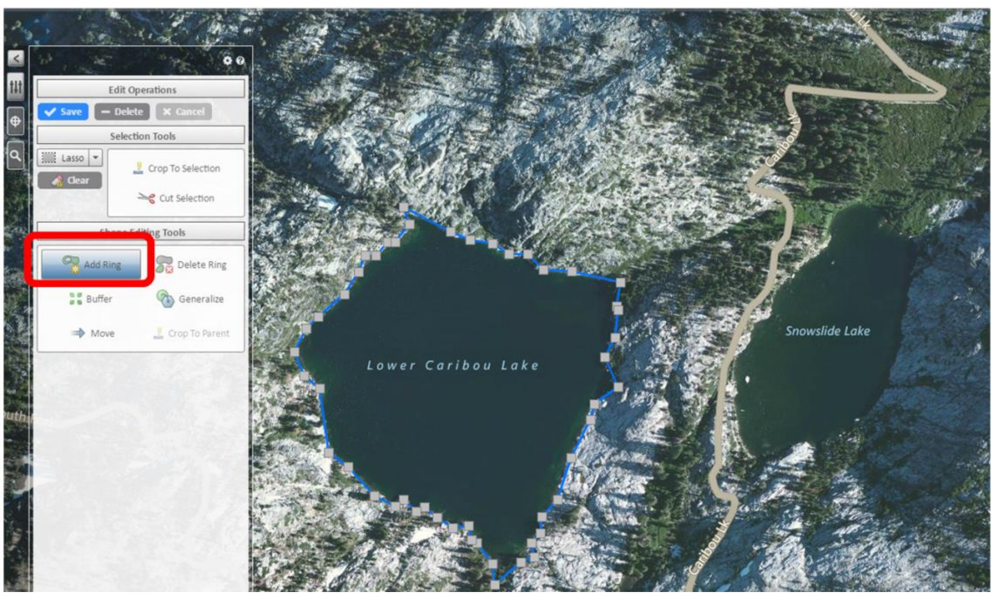
- To exclude an area within the shape boundary, select the area you would like to exclude and click **Cut Selection**.
- To crop an area from the shape, select the "good" area and click **Crop to Selection.**



Create a Multi-Shape Polygon

To create a multi-shape polygon (multiple distinct geographic areas or rings in one plan/project/action):

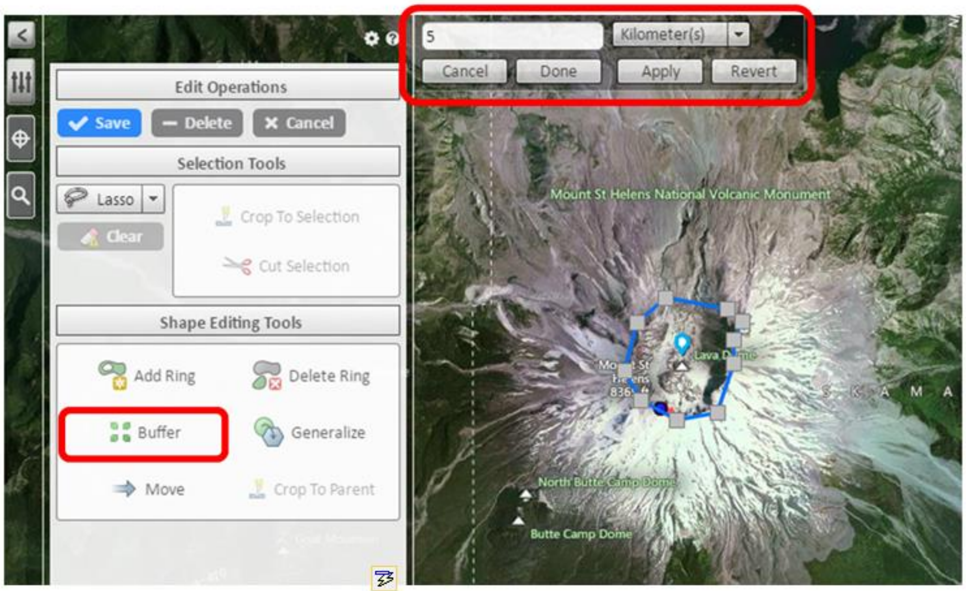
Draw the first shape and then click **Add Ring** to draw another shape to be added to the plan, project or action area. Use the **Delete Ring** button to remove it. Once all rings have been added, click **Save**.



The map will now display the rings as part of the overall project, plan or action area.

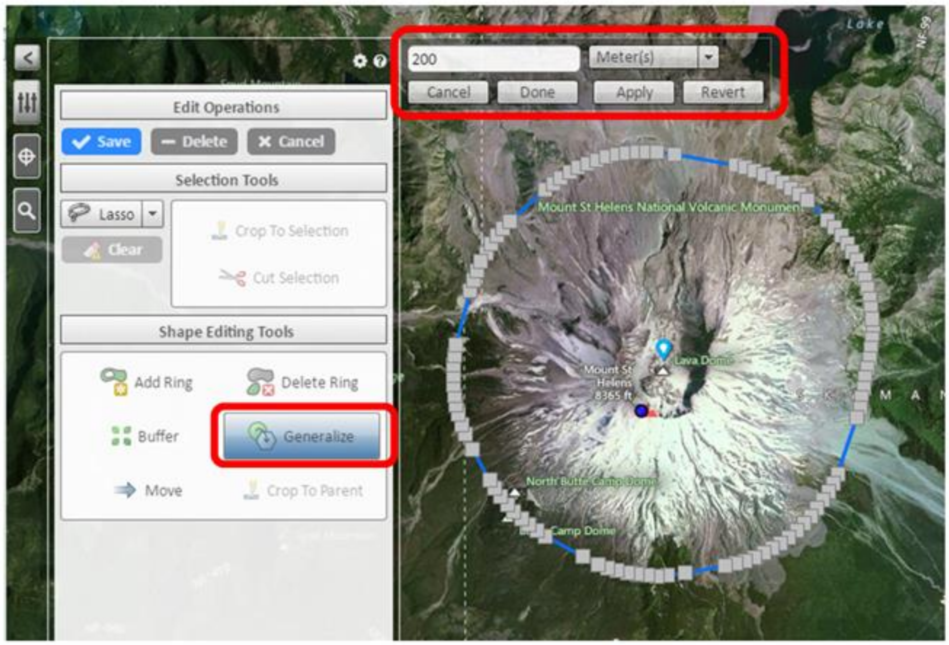
Buffer a Shape

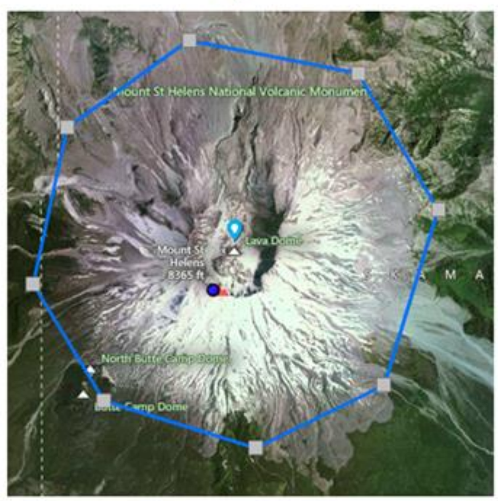
- To extend the area around a shape, click **Buffer** and fill out the box that opens to the top right of the window.
- Enter the amount and select the measurement from the drop down menu (meters, kilometers, miles or feet). (Note: using a negative value with shrink the feature by the specified distance).
- Click **Apply**.



Generalize a Shape

- Click **Generalize** to simplify a shape by reducing the number of vertices (gray boxes indicating changes in direction).
- Enter the amount and select the measurement from the drop down menu (meters, kilometers, miles or feet).
- Click **Apply**.

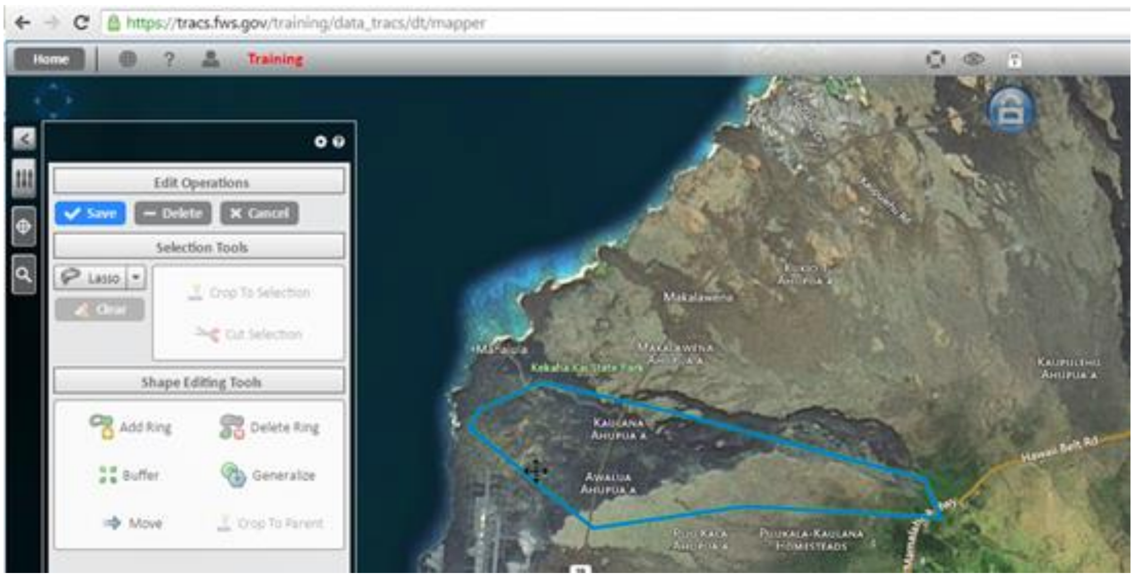




Move a Shape

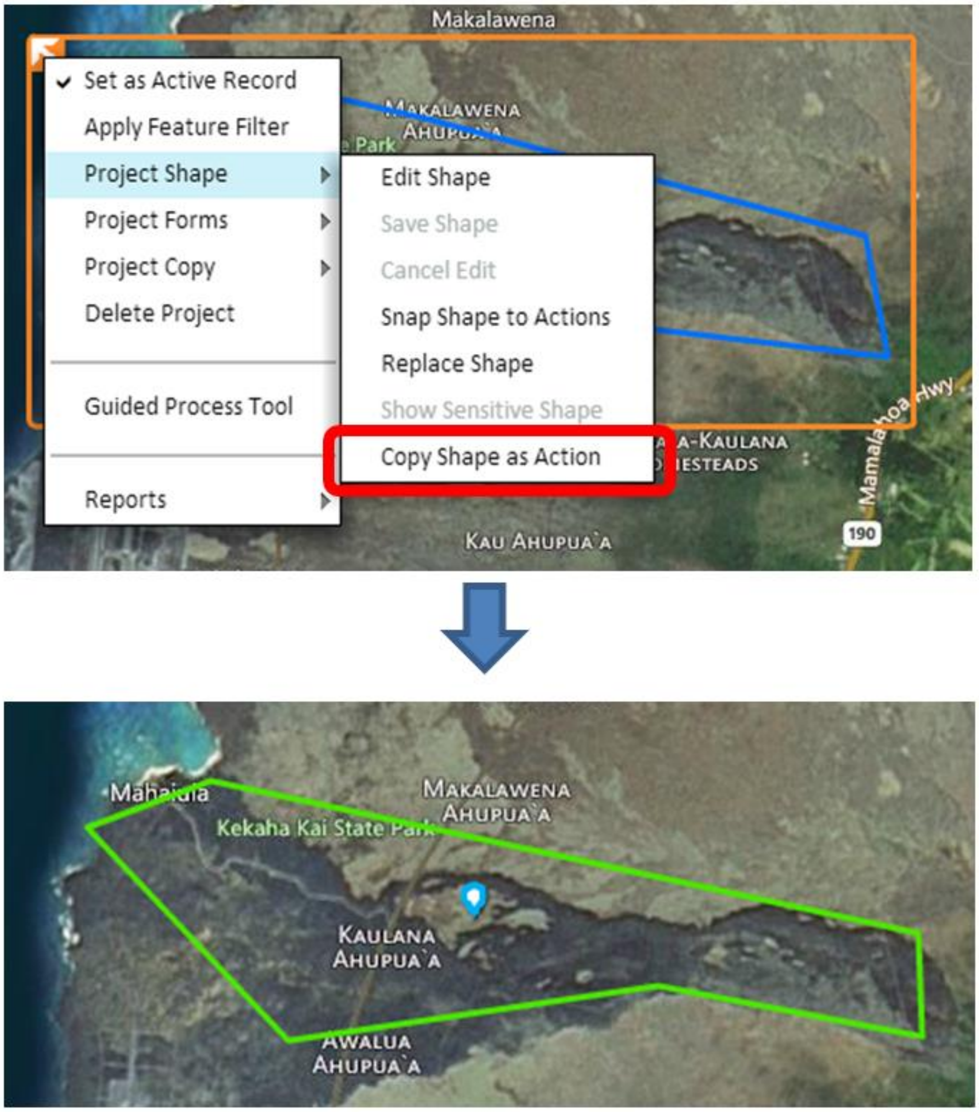
- Click on the lock icon (middle of the top toolbar) to lock the screen from moving (a blue lock icon will appear at the top of the screen).

- Click the **Move** button and a black arrow will appear on the screen. Select the feature to drag and drop it to a new location. Then click **Save**.



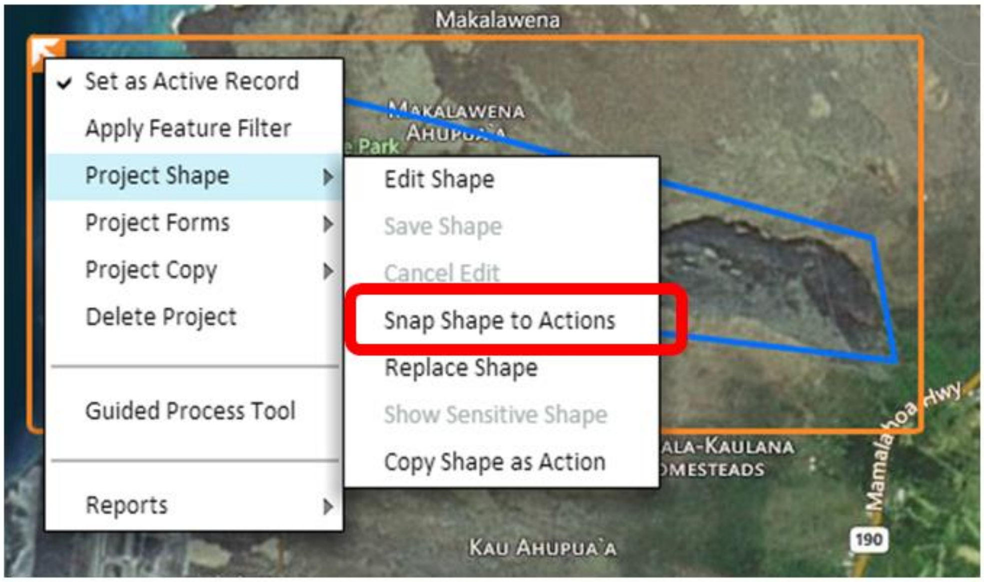
Copy the Project Shape as Action

- Locate the project polygon on the map and click inside the shape's boundary to open the orange Feature Frame box around it. Click on the arrow in the upper left to open the menu.
- Click on Set as Active Record if a checkmark is not present (Note:This does not change the project status to active. It is used to mark a project shape as the active feature in order to associate an action to that project).
- Select the Shape menu and select Copy Shape as Action. The action shape will appear in green and the window to enter action data will open.



Update Project Shape to Action Shape

- Locate the project polygon on the map and click inside the shape's boundary to open the orange "Feature Frame" box around it. Click on the arrow  in the upper left to open the menu.
- Select the Shape menu and select Snap Shape to Actions.

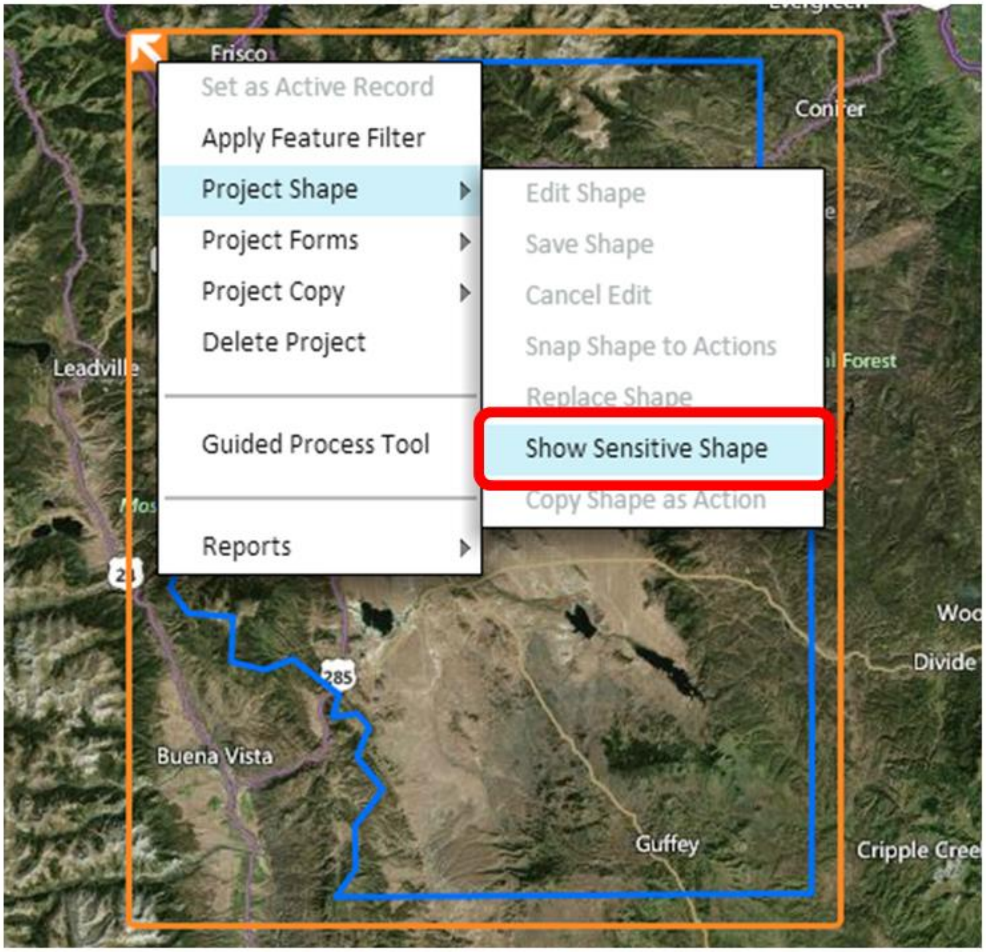


- If you create a new action that is outside the boundary of the project, this error message will appear:
  - Click Auto Correct to update the project shape to include the action boundary.
  - Click Dismiss to edit the action shape. Use the Crop to Parent button to crop the action area to the project boundary.

Show or Hide Sensitive Shape

- If a project is marked as sensitive on the Project Properties form, the shape will be buffered (or extended) to the county or state boundary so the exact location is not shown on the map or displayed on public reports.
- Locate the project polygon on the map and click inside the shape's boundary to open the orange Feature Frame box around it. Click on the arrow  in the upper left to open the menu.
- Select the Shape menu and select Show Sensitive Shape. A checkmark will appear next to "Show Sensitive Shape" and the map will show the exact project polygon location.

- Uncheck the selection to buffer (hide) the location again.



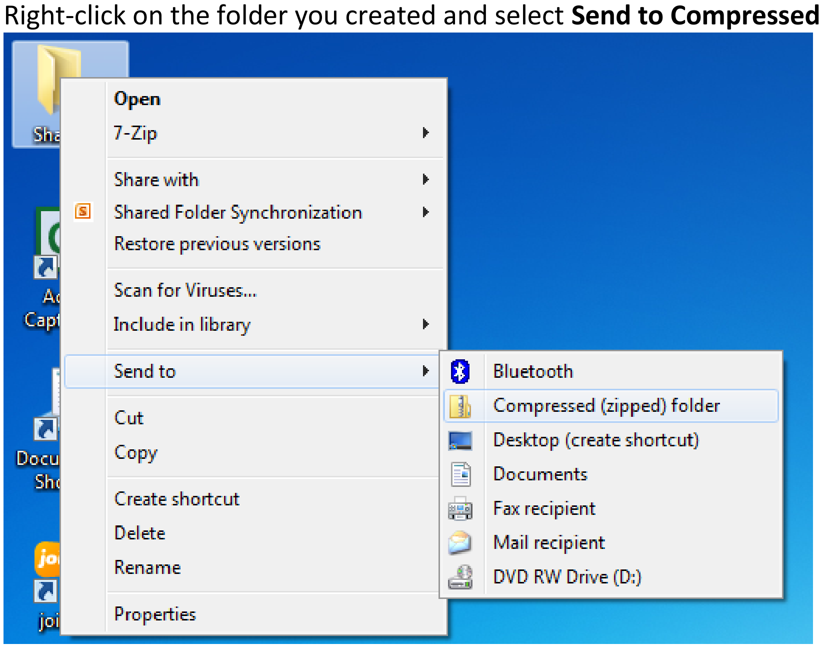
Lesson 13: Import Shapefiles

The shapefile import tool allows users to create Plan, Project, or Action boundaries from data produced by GIS software.

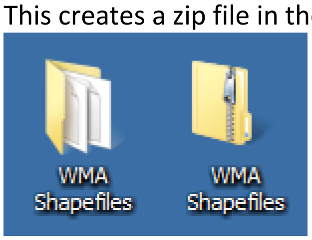
The TRACS shapefile import tool requires a zip file that contains standard shape file extensions. The shapefiles must contain only polygon data and must have a coordinate system (.pri) file. A zip file may contain more than one shapefile and its associated extensions.

1. To create a zip file, assemble your GIS file extensions (e.g. .shp, .dbf, .prj) in one folder.

2. Right-click on the folder you created and select **Send to Compressed (zipped) folder**.

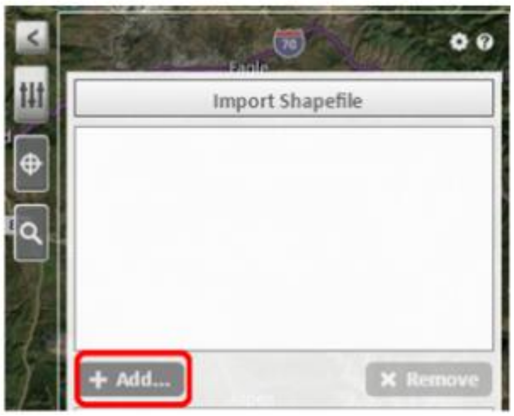


3. This creates a zip file in the same location as the original folder.

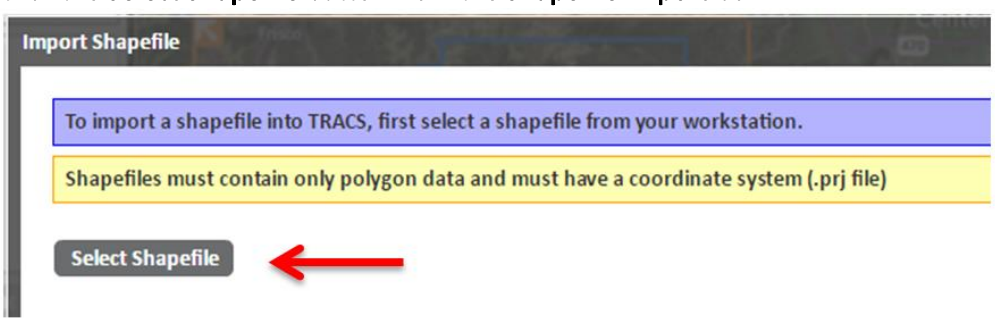


4. In TRACS, use the Guided Process Tool to create a new project or action. For a plan, select the feature editor dock on the left. Select **Import Shapefile** (folder icon) for the appropriate feature (project, plan or action).

5. Click the **Add** button from the **Import Shapefile** window.

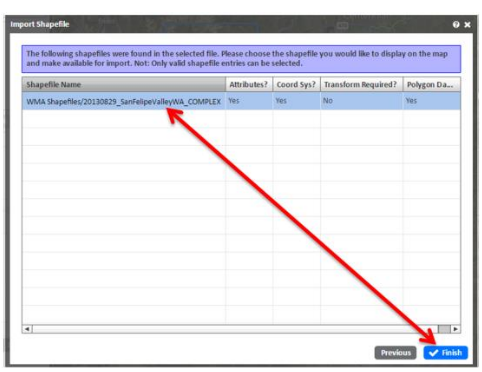


6. Click the **Select Shapefile** button from the **Shapefile Import** box.

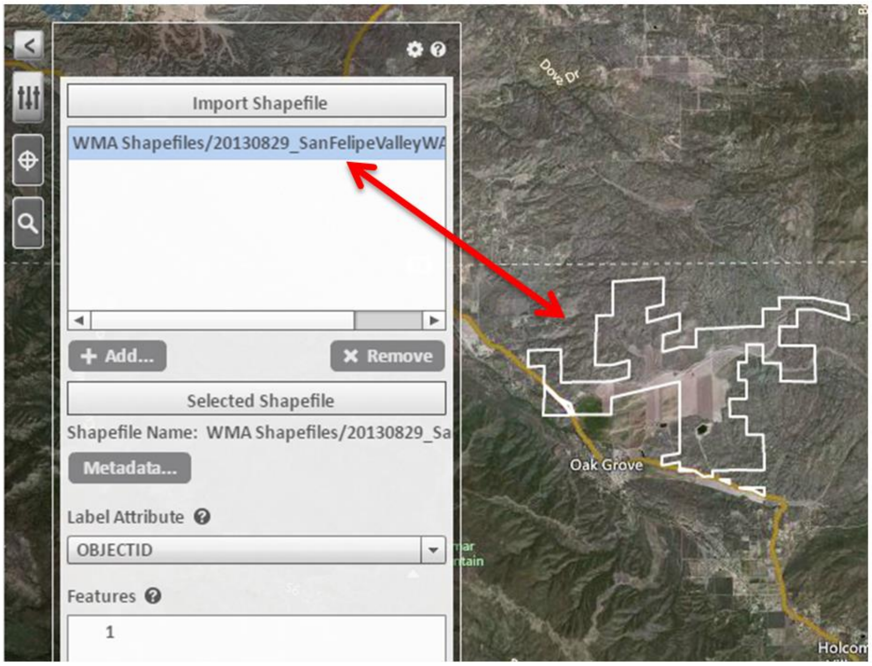


7. Navigate to the folder on your local machine where you created the zip file and click the **Open** button.

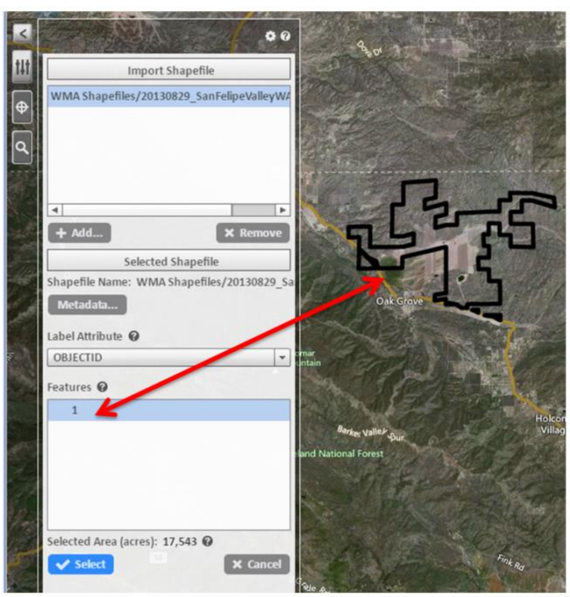
8. Select the shapefile and then click the **Finish** button. Note: The **Coord Sys** and **Polygon Data** columns must display "Yes" in order to import the file.



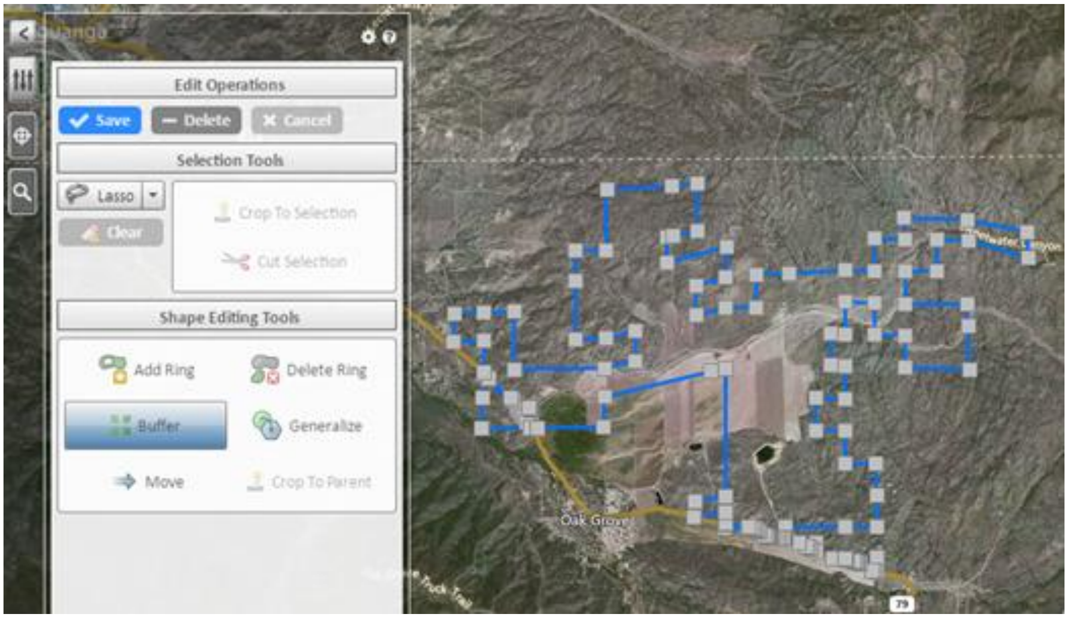
9. The shapefile is now imported but has not yet been saved. Select the shapefile name in the top box (highlights in blue). The shape will appear on the mapper outlined in white.
    - Optional: Select an attribute from the **Label Attribute** drop down list to change how features are labelled.



10. Click on a feature to display it on the mapper in black**.** To select more than one feature, hold the Shift or Ctrl key down to select them. Click the **Select** button to select the feature as the project shape.



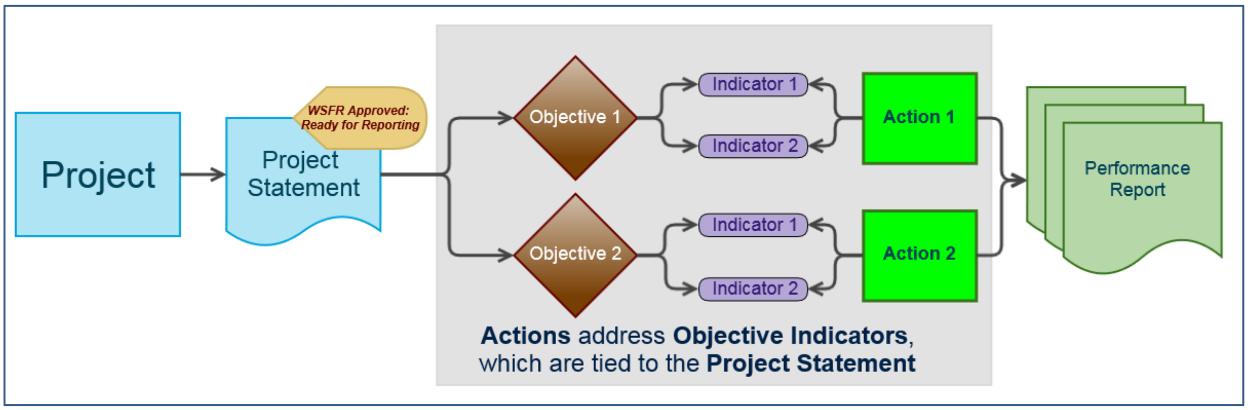
11. The black outline is converted to a blue **Project** boundary (or a green boundary for an action or red for a plan). Edit the shape if needed and click **Save**. This will open the Project form to begin data entry.



Lesson 14: Projects with Multiple Statements

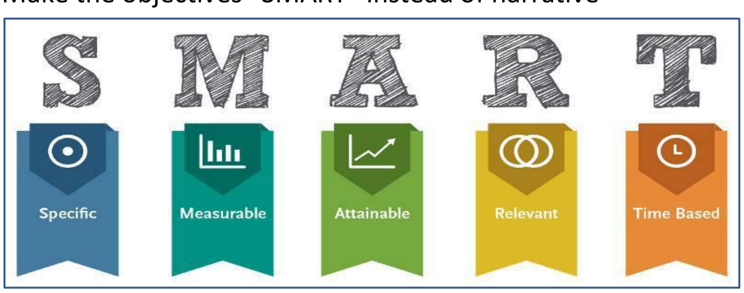
Project Structure Overview

- **Project:** geo-spatially represented, defines overall type of work
- **Project Statement(s):** correlate desired outcomes, actions and costs
- **Objectives:** specific goals that will be reported as actions



Project Tips

- Design the project with reporting needs in mind
- Fields for public display should be written in common language free of scientific jargon and acronyms (fields will display eye icon)
- Write or outline the project proposal and save in an electronic copy (i.e. Word or PDF) then copy and paste into the appropriate TRACS fields
- Well written and organized projects can be copied in the future using the Copy button in TRACS
- Think “backwards” in terms of objectives and actions to determine approach (Use the TRACS Action Level Spreadsheet to “reverse engineer” the project based on the desired outputs)
- Make the objectives “SMART” instead of narrative

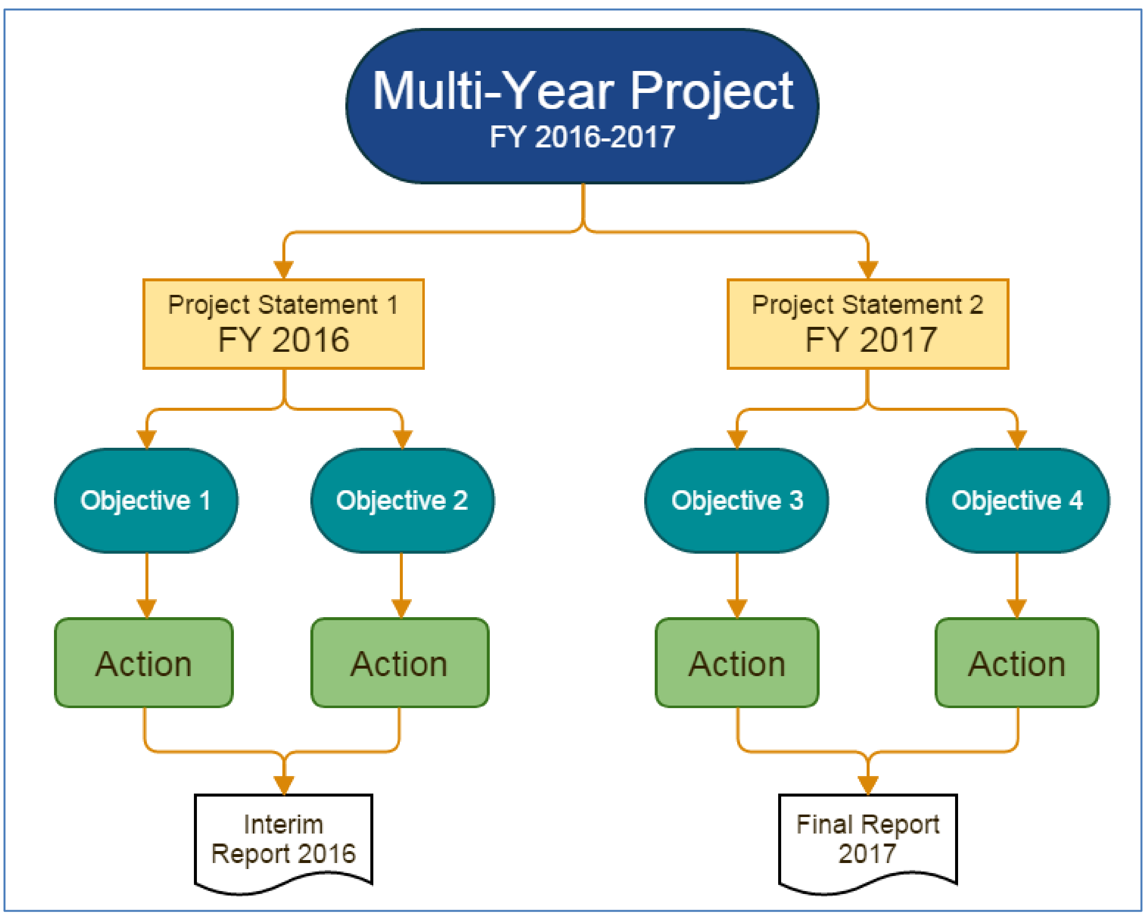


TRACS affords many possible grant/project structures. All projects, regardless of TRACS structure, should result in the same reportable TRACS ACTIONS.

- **Two basic methods:**
  - 1:1 One Project and One Project Statement
  - 1: 2+ One Project with Multiple Statements (used for multi-year or multi-grant programs)

- **Design Factors:**
  - **Workload:** one project with multiple statements can share a project properties reducing workload
  - **Public Perception:** what does the public see? One project vs. many projects in the same location (ex. multi-year project)
  - **Spatial Data:** project with multiple statements should all have the same project boundary
  - **Complexity:** how many projects or project statements can be effectively managed in the workflows

Multiple Project Statements by Year Example:

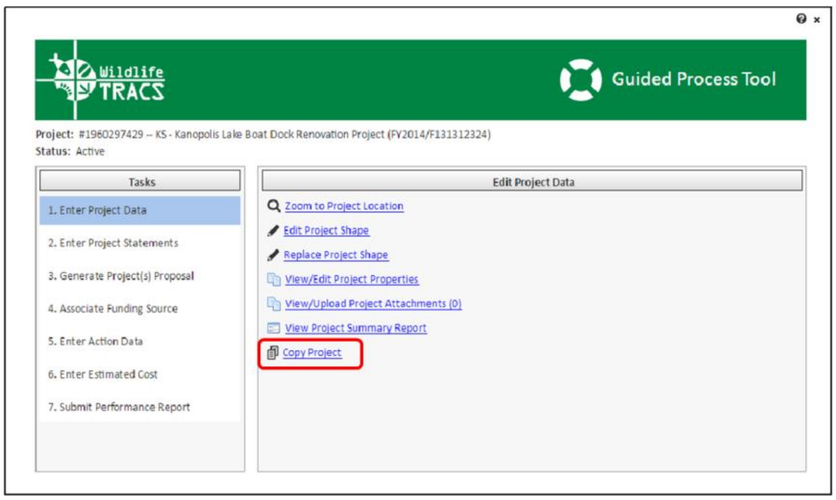


Lesson 15: Copying and Deleting Projects

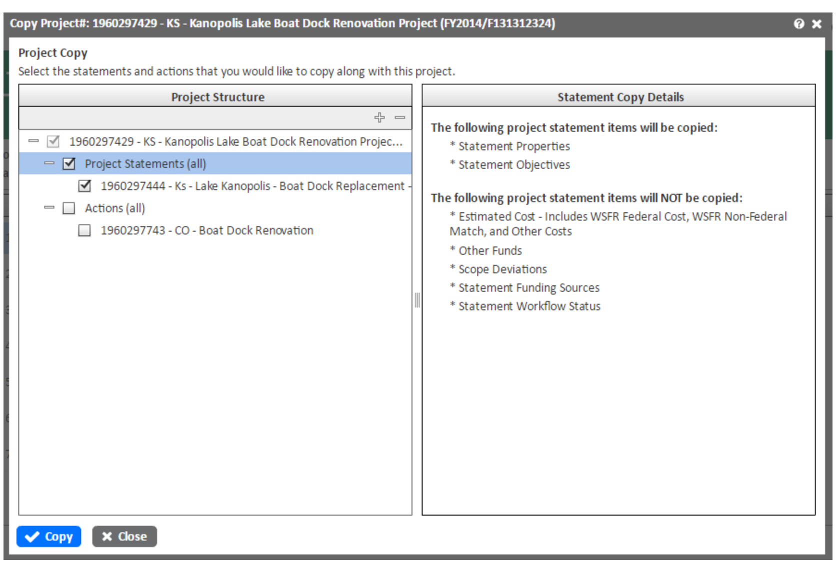
Copy a Project

The Copy Project button allows users to copy an existing project to create a new project titled "Copy of" (title of project). Note: The Copy Project option is not available for Legacy Projects.

1. Select Task 1: Enter Project Data and select **Copy Project** on the right side.

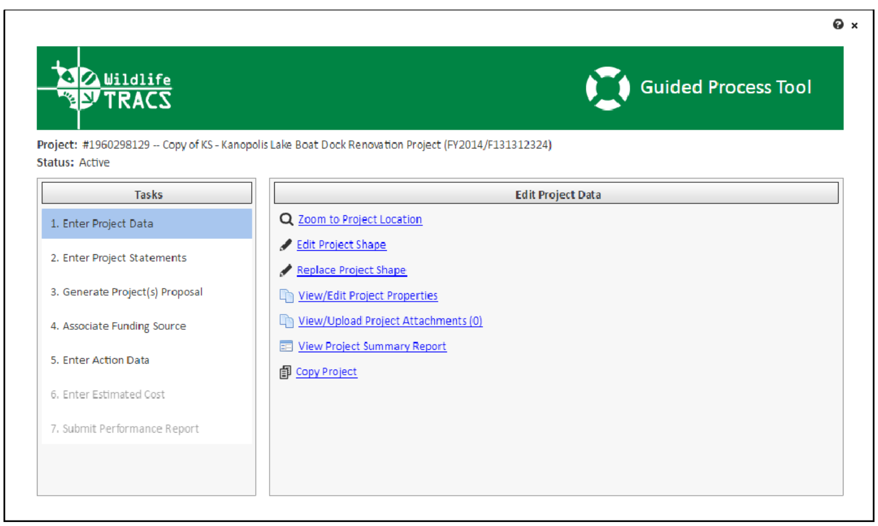


2. The Project Copy window will open. Select the statements and actions that you would like to copy along with this project by checking the boxes and click **Copy.**

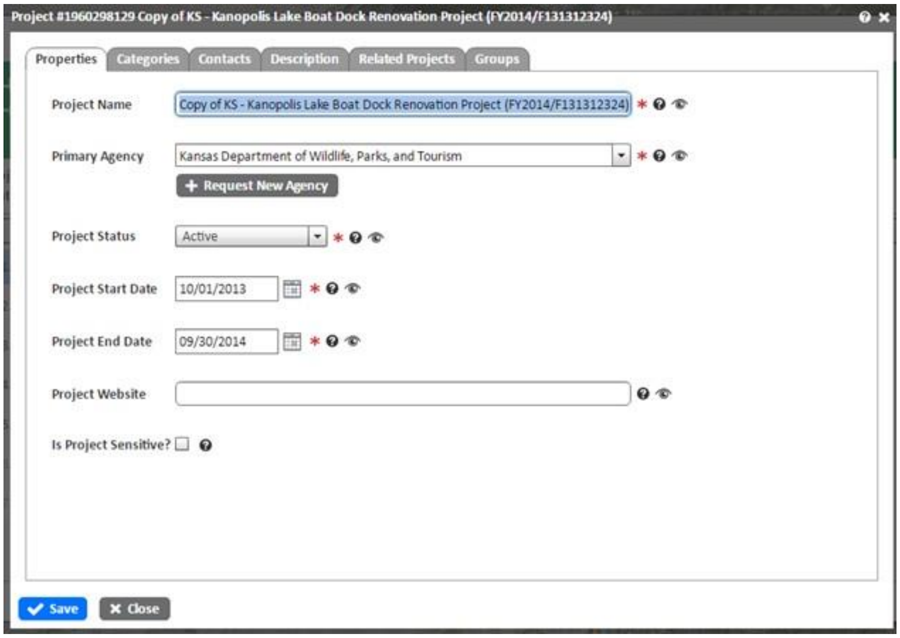


3. Click Open Copy in Guided Process Tool button.

4. The copy will open. Select **View/Edit Project Properties** on the right side.



5. Update the Project Name, removing "Copy of" and click **Save**. Then proceed with updating or entering project information.



Delete a Project

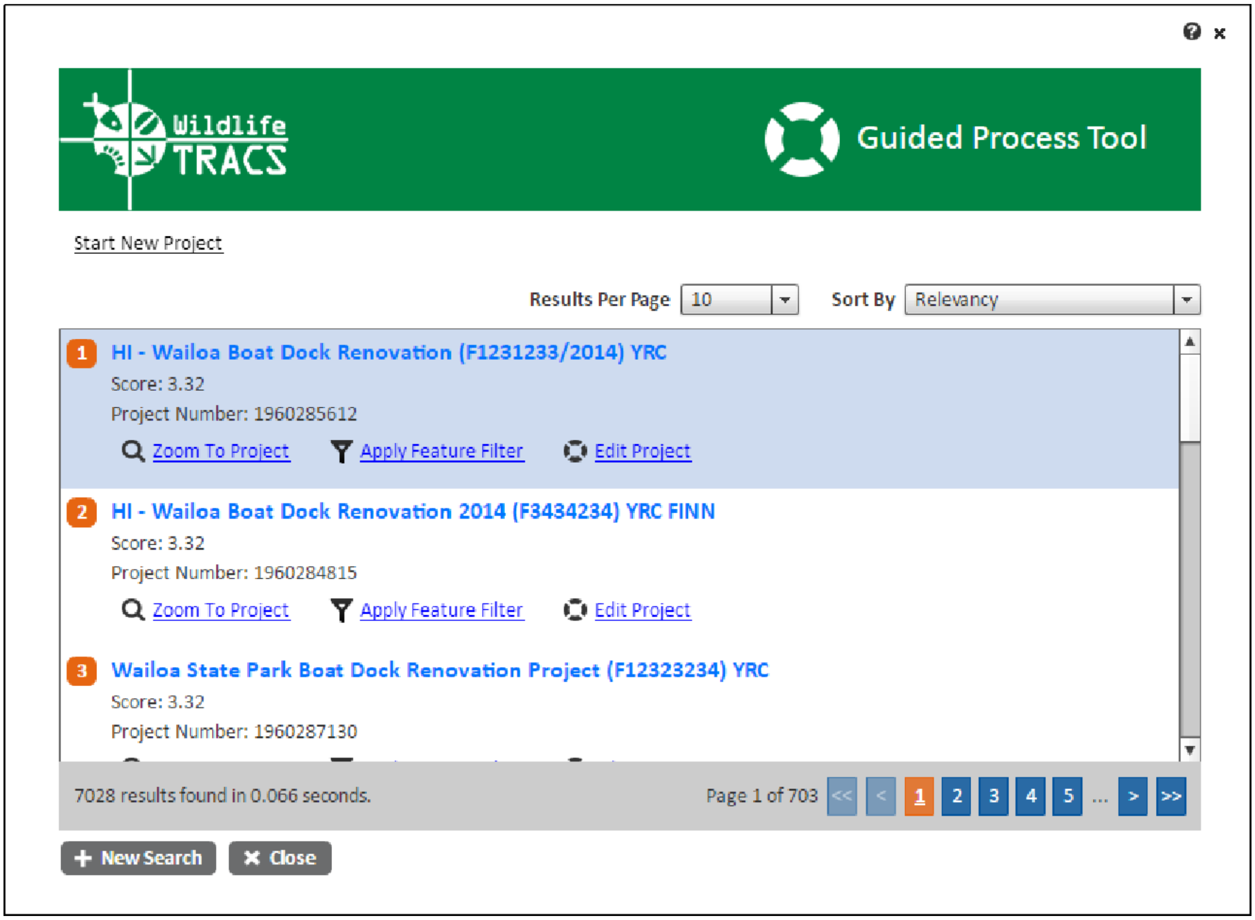
There are at least two ways to delete a project in TRACS. The easiest method is documented below (with some alternative methods also listed further down).

CAUTION: To delete a project, plan or action, delete the polygon or shape. Deleting a polygon (or shape), will delete all associated data.

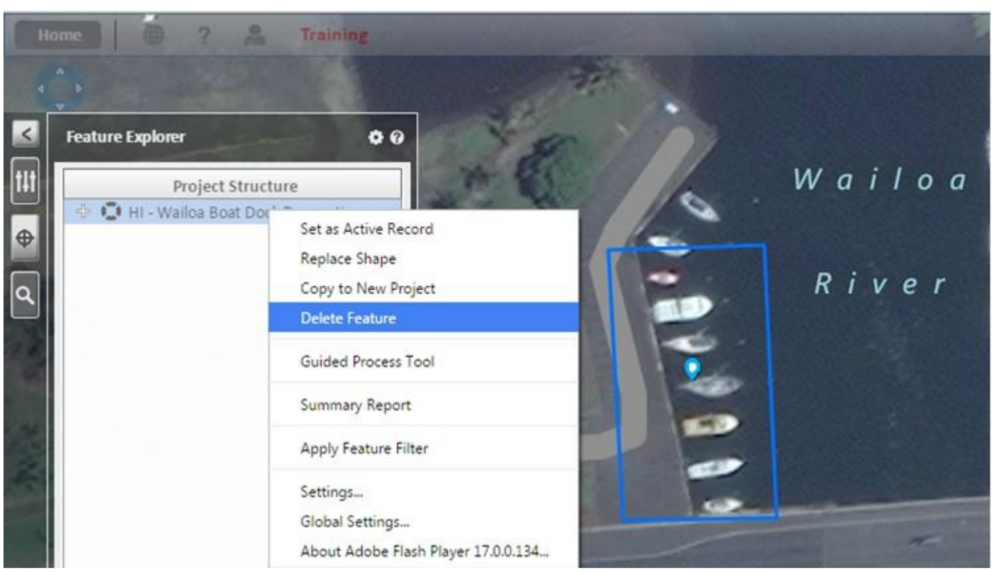
TIP: <u>The Project cannot be deleted once it has been approved without rescinding approval.</u> To delete an approved project, the reviewer/approver must first "Rescind Approval" on the associated Project Statement(s). For more information, go to Chapter 17: Revisions and Amendments.

1. Select the Guided Process Tool (top toolbar) and search for the project by entering the project number or part of the project name.

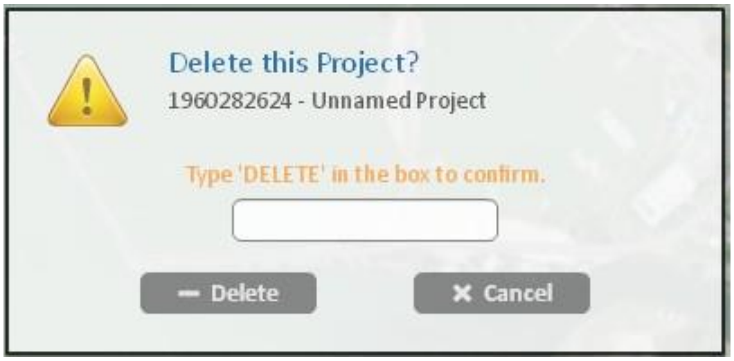
2. In the Search results, select **Apply Feature Filter** (a filter will be created to only see that project on the mapper, which displays on the right side dock).



3. Click on the blue project point on the map to display the Feature Explorer (left side dock). Right-click over the project name to open a menu of options. Select **Delete Feature**.

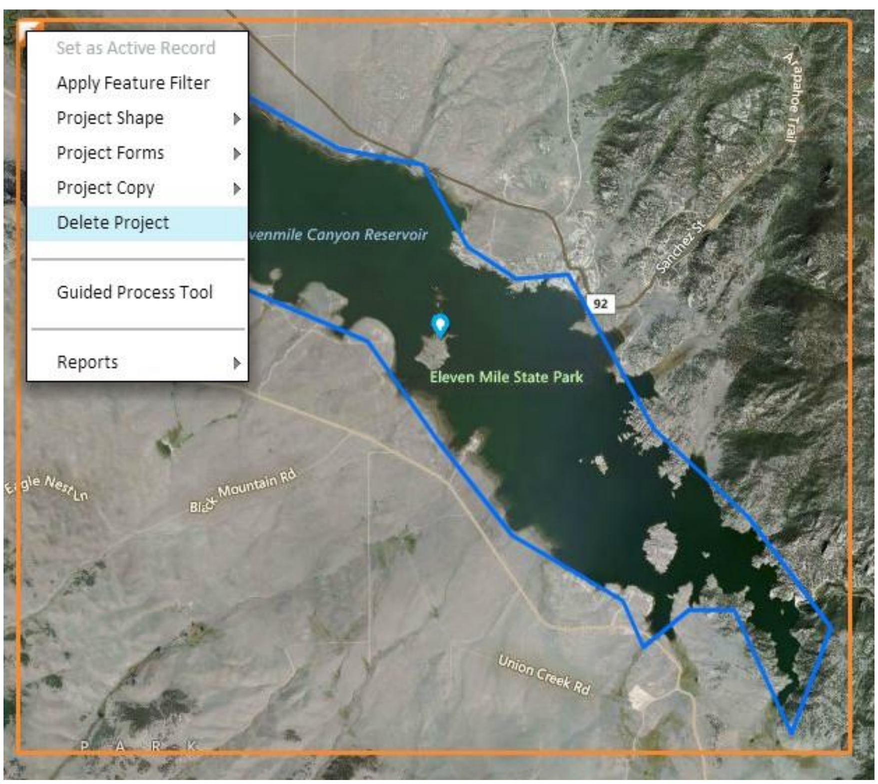


4. The Delete window will open. Type DELETE in the box to confirm and then click **Delete**.

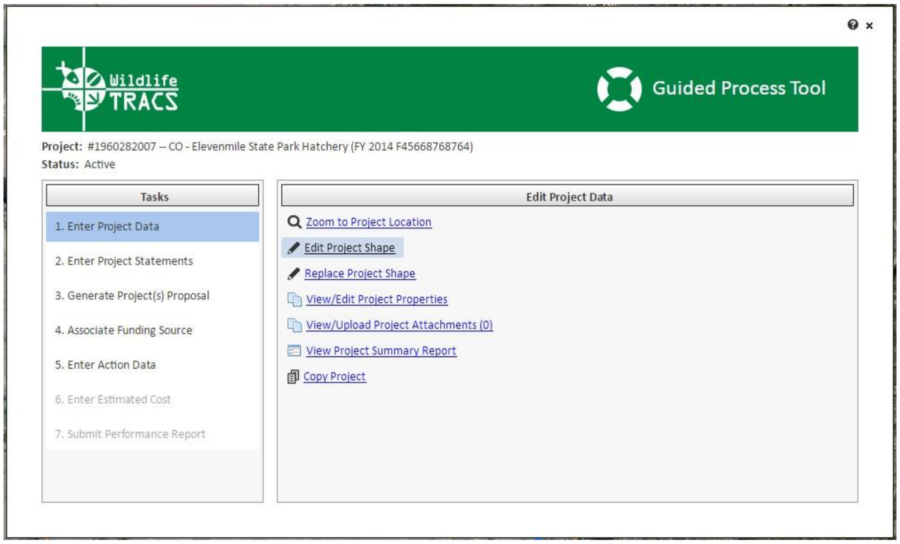


Alternate Methods:

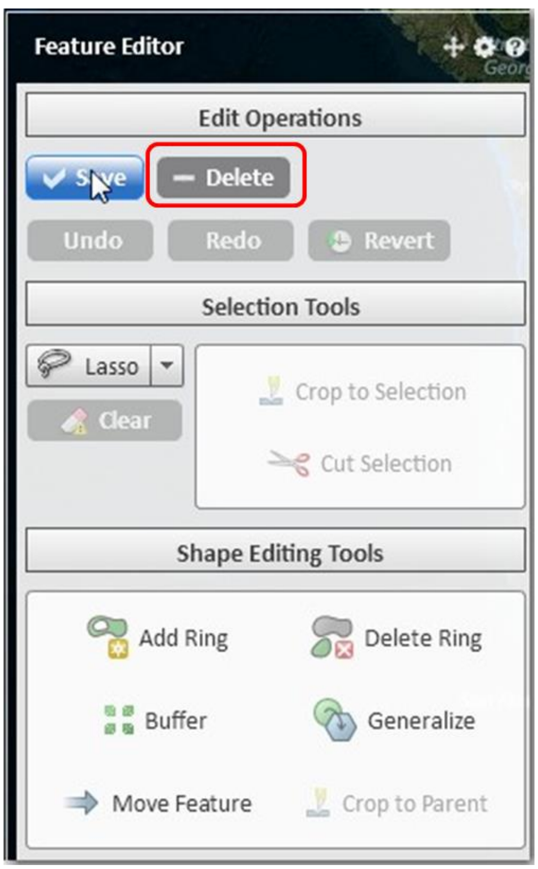
Select the project boundary (in blue) and an orange Feature Frame box will appear around the shape. Click on the arrow in the upper left of the orange feature frame box to open a drop down menu and select Delete Project.



The Delete Project button can also be accessed from the Guided Project Tool for the project. Click on Task 1: Enter Project Data and select Edit Project Shape.



In the Feature Editor window, select the Delete button.

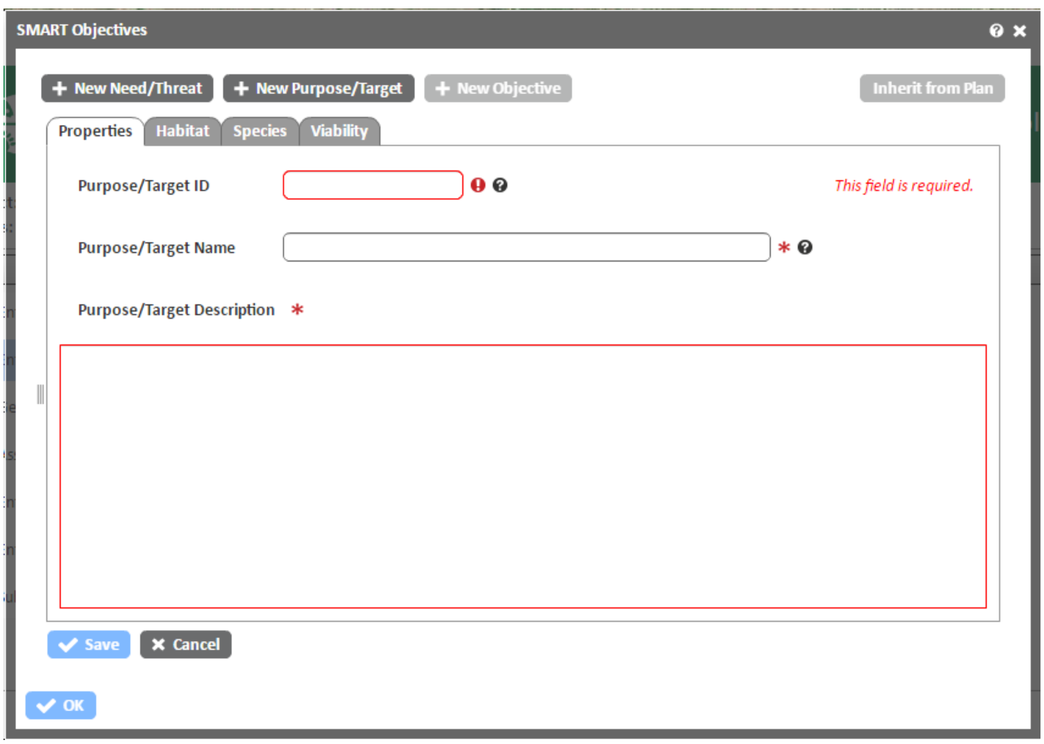


Lesson 16: Habitat and Species

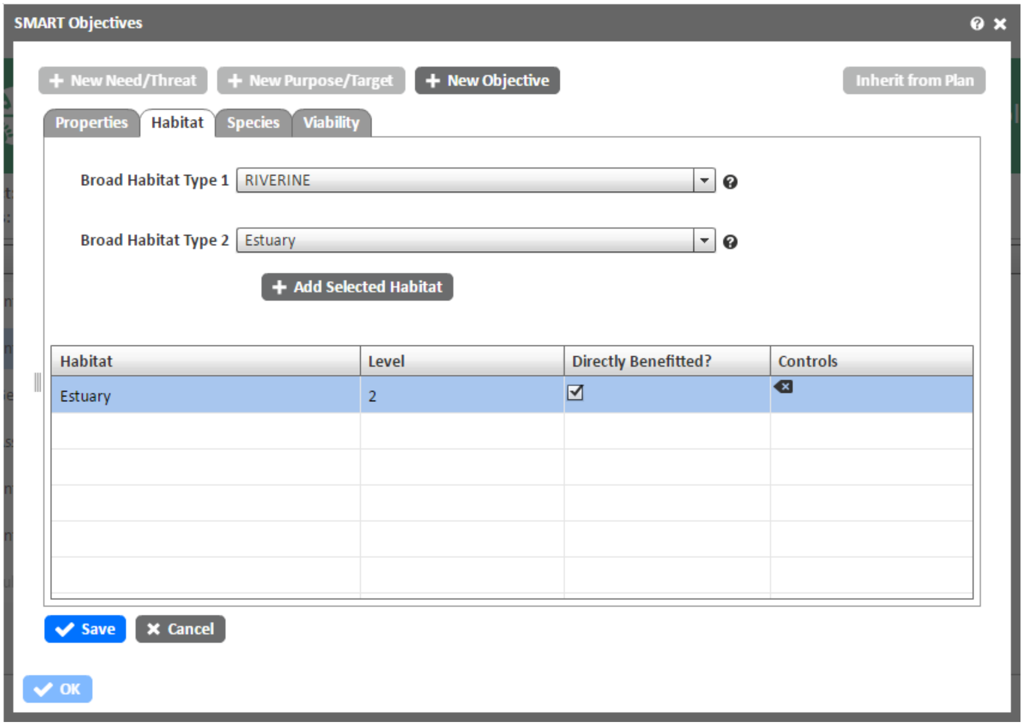
Projects with habitat or species are created in the same way as any other project. This lesson does not go through the entire project entry process; It just goes through the additional steps required to enter a project that impacts habitat and/or species. For more information on the basics of entering a project view lessons 1-10.

When creating the objectives, select the New Purpose/Target button to identify the habitat(s) and/or species targeted by the objected. After entering the ID, name and description, fill out the Habitat, Species and/or Viability tabs as applicable. For more information, view Lesson 5 Entering Objectives.

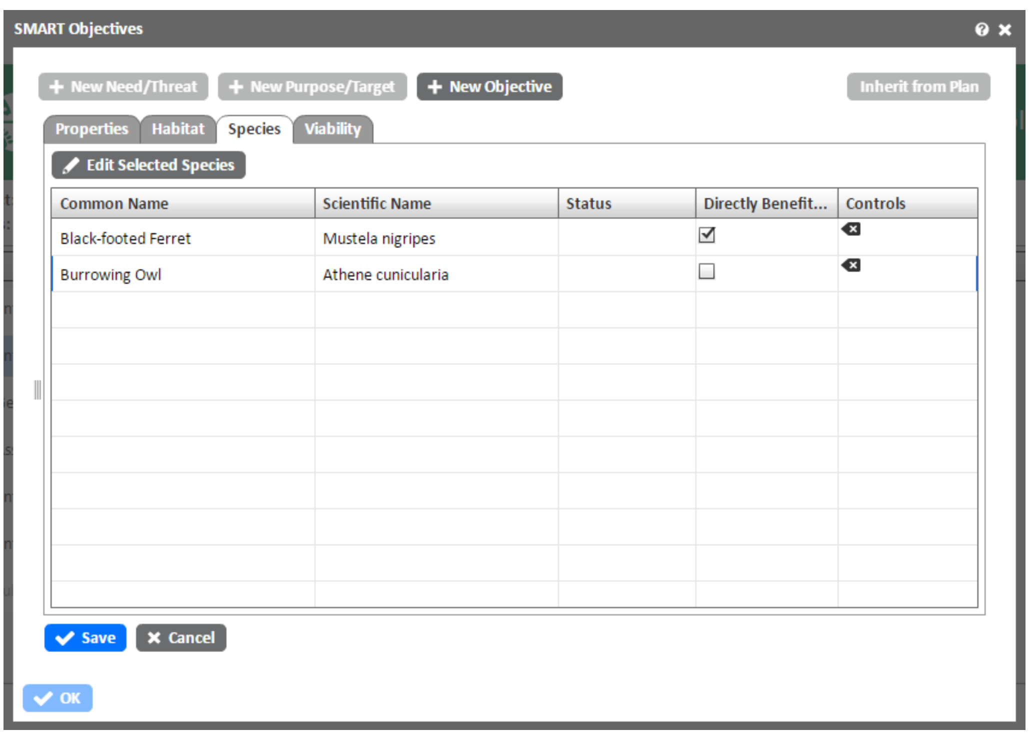
Purpose/Target Properties Tab:



Purpose/Target Habitat Tab:

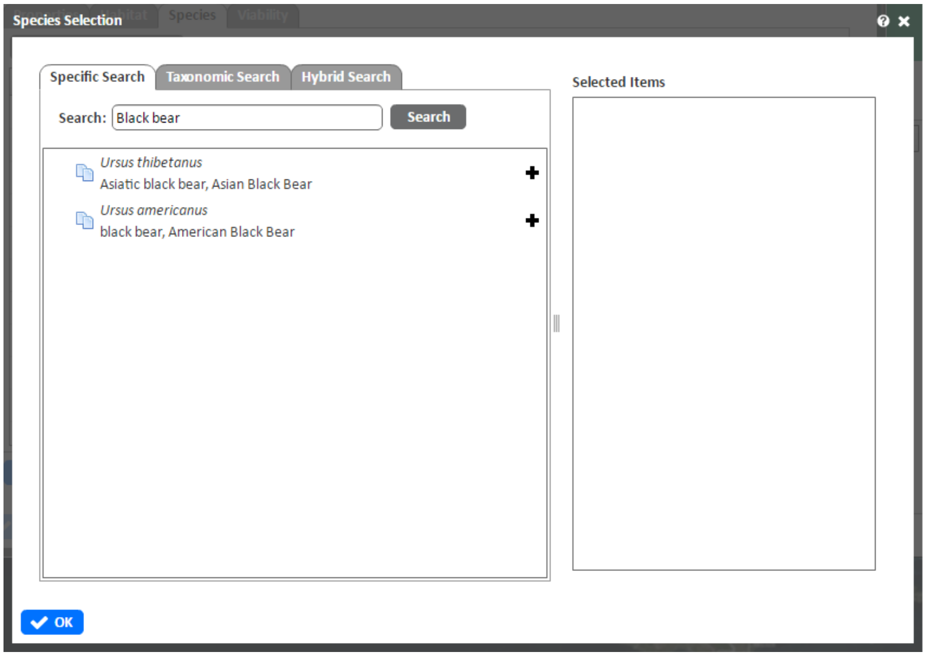


Purpose/Target Species Tab:

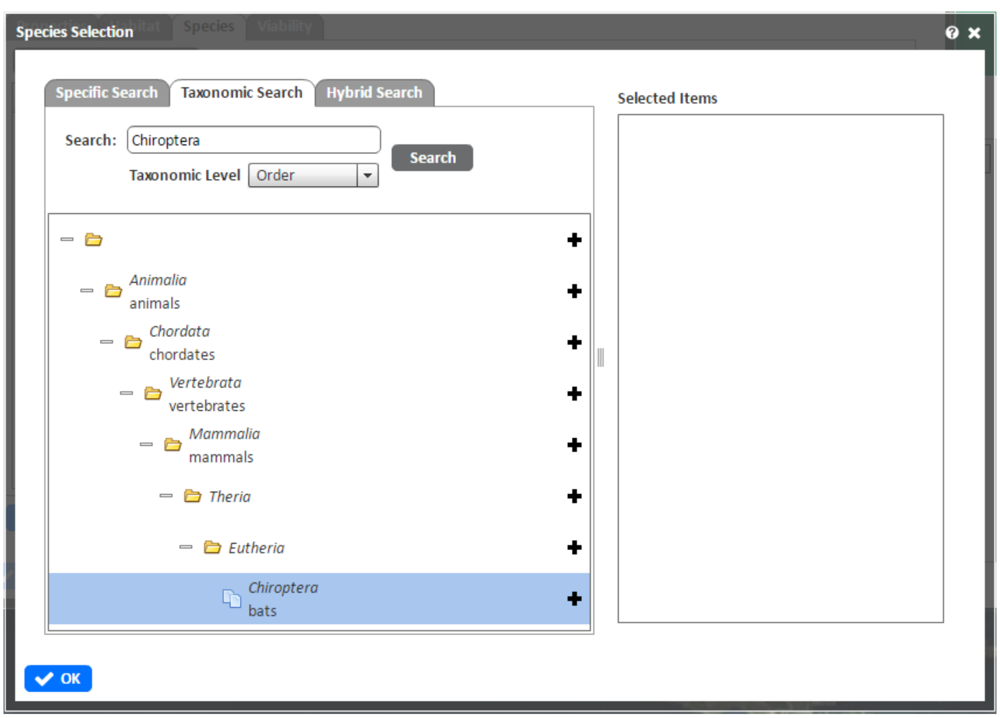


- Add Species with the "Edit Selected Species button".

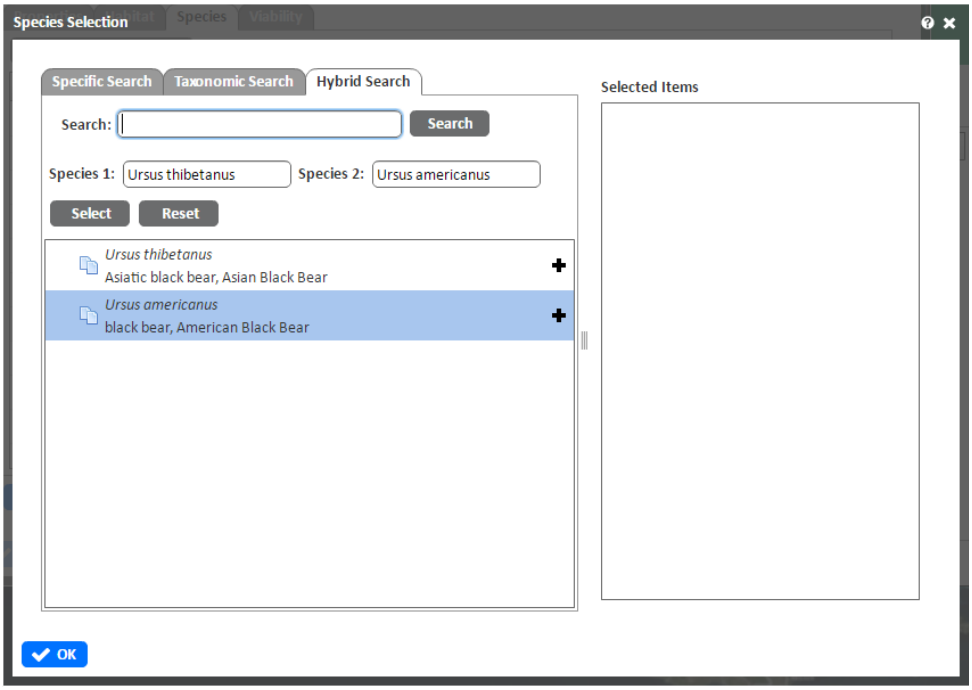
- Search for the species using the search tabs:
    - **Specific Search tab:** enter part of the common name or scientific name and click Search.



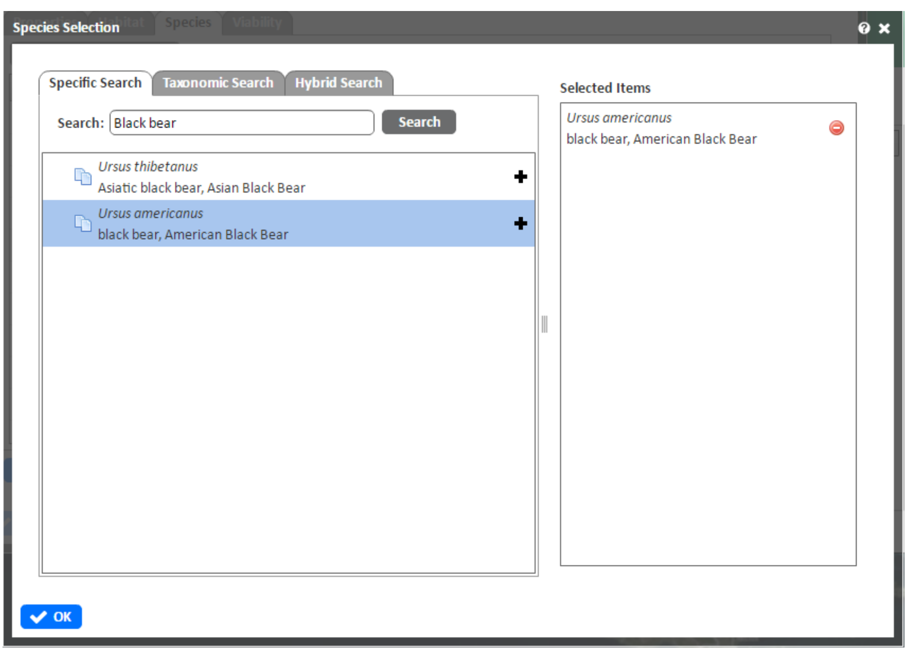
- **Taxonomic Search tab:** select the taxonomic level (e.g. genus) and enter the name in the search field. Click on the + sign to expand the menu and select the level to add before clicking the + sign to move the item over to the right side.



- Hybrid Search tab: search for the species and click the plus sign (+) to add the two species to the Species 1 and 2 boxes (e.g. add a tiger and a lion to create a liger).

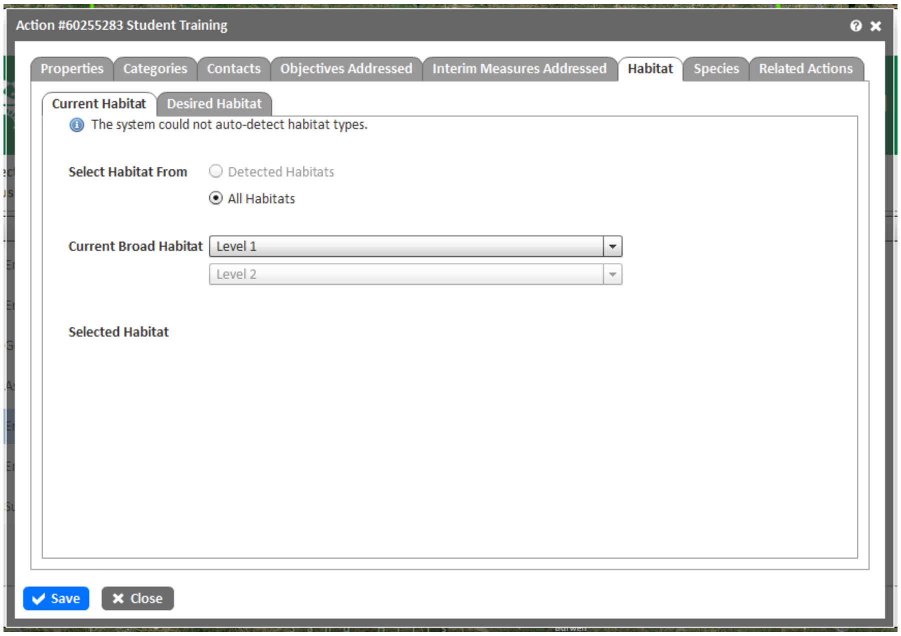


- Click the plus sign to add a species to the Selected items on the right side (or click on the red minus sign to remove a species).

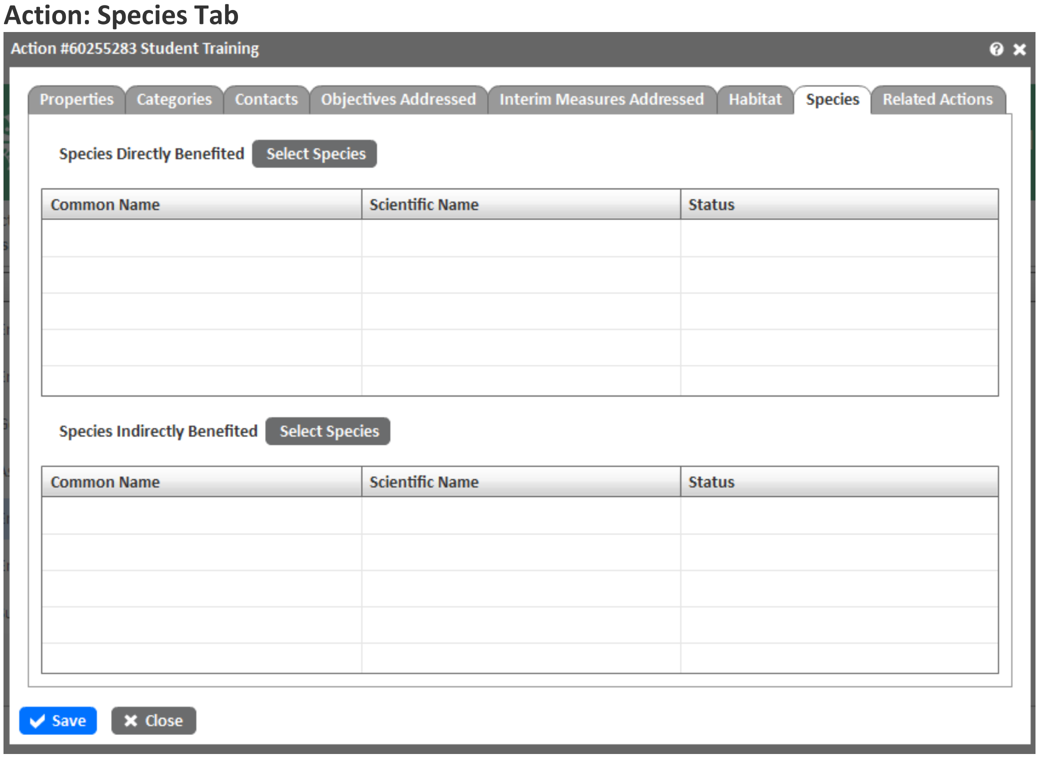


The other place where habitat and species information is documented is on the action form. The Habitat tab is used to document the current and desired habitats affected by the action. The Species tab is used to document species impacted by the action. Use the “Select Species” button by the Directly Benefited or Indirectly Benefitted sections. For more information, view Lesson 8 Mapping and Entering Actions.

Action: Habitat Tab



Action: Species Tab



Lesson 17: Revisions and Amendments

Once the project statement has gone through the approval workflow, most of the data in the project statement is no longer editable unless you go through the revision or amendment process.

Revision (Rescind Approval) vs. Amendment (New Draft):

- A revision is used to edit the original project proposal during the approval process (the approval is rescinded, changes are made to the original project and it is sent back through the approval workflow).
- After the project proposal has been approved, an amendment is required if there is a change in length, scope and/or estimated cost. NOTE: A change in estimated cost alone does not require a new amendment (new draft).

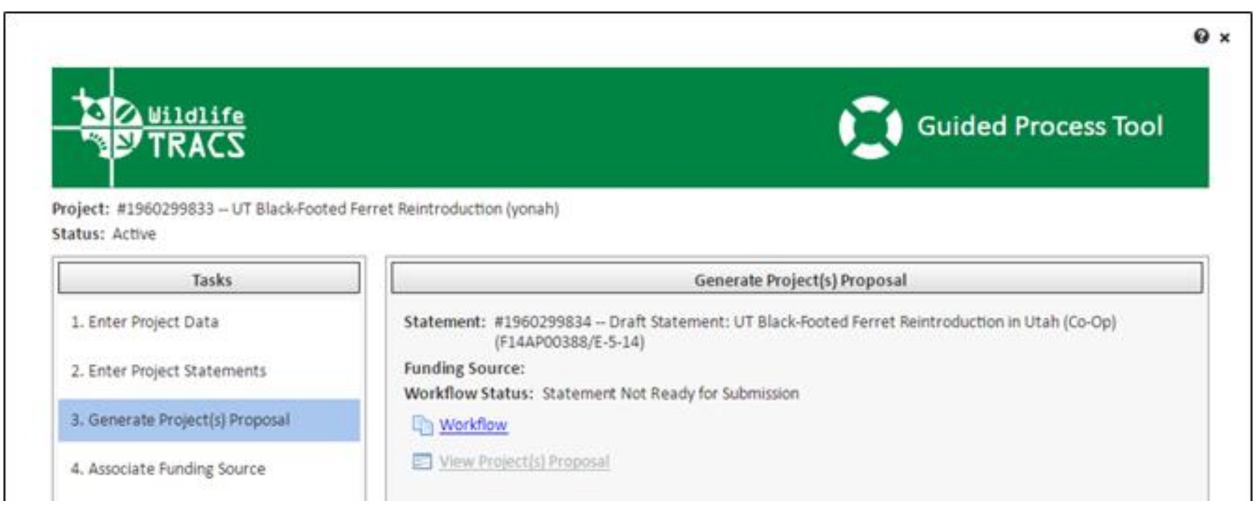
Revision (Rescind Approval)

A revision is a change to the original project proposal that will be sent back through the approval process. The project cannot be edited or deleted until the approval has been rescinded.

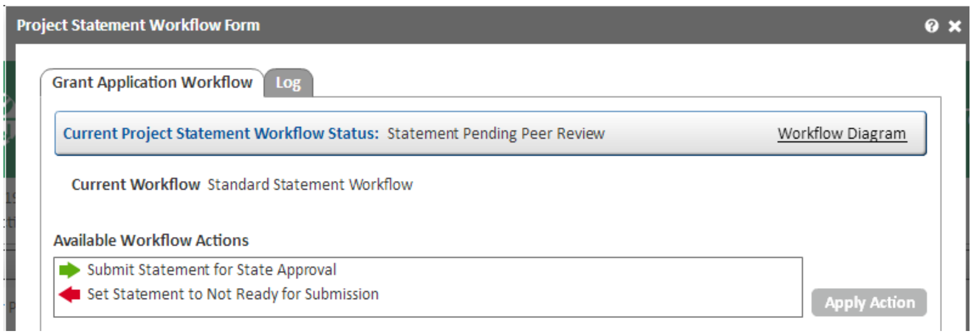
Contact your WSFR federal approver and state approver to rescind the approval.

The approvers will need to open the project, either through the workflow manager (see chapter 21.2 Workflow Manager) or by searching for the project using the Guided Process Tool (see steps below).

From the Guided Process Tool, select “3. Generate Project Proposal” in the left pane, and click the “Workflow” link on the right.



In the available workflow actions, the federal approver will need to select **Do Not Approve** and click the **Apply Action** button. The federal or state approver will then need to select **Rescind Approval** and click **Apply Action**. The last step is to select **Set Statement to Not Ready for Submission** and click **Apply Action,** to change the status back to “Statement Not Ready for Submission”, the status that allows the project to be edited or deleted if needed.

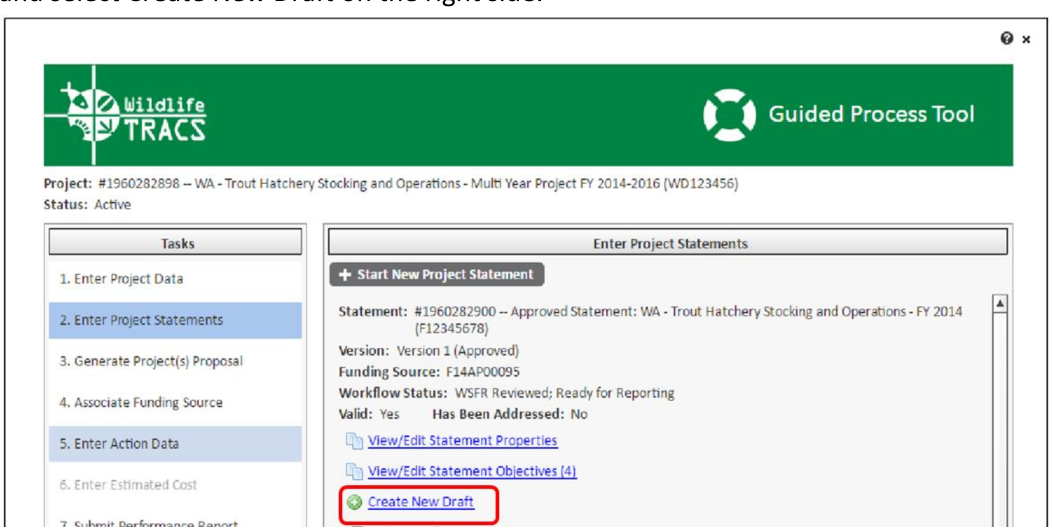


Make any changes or edits to the project. Once the project has been edited, send it back through the approval workflow.

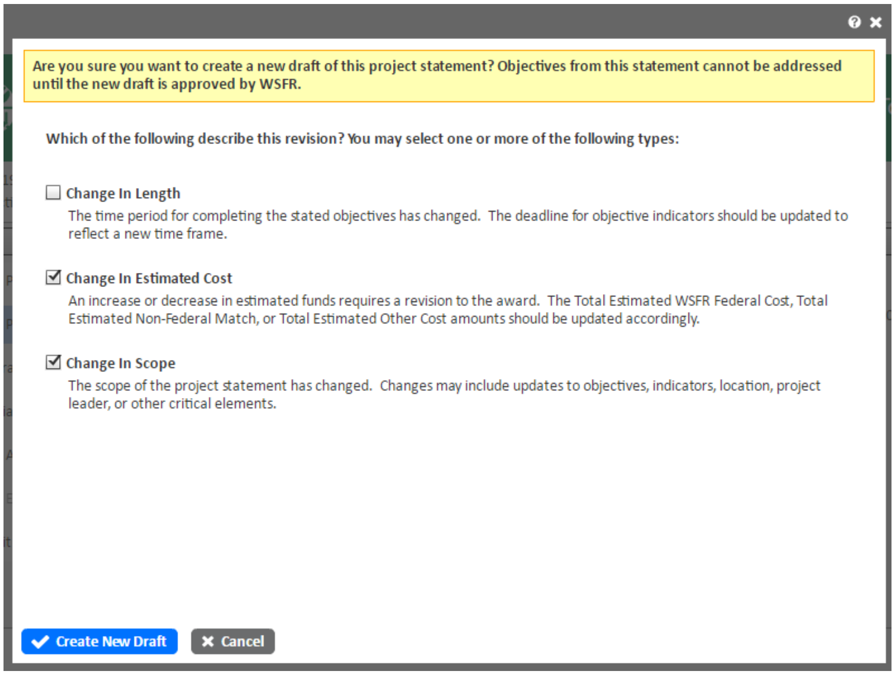
Amendment (New Draft)

Once the project has gone through the approval workflow, it will have a status of WSFR Reviewed Ready for Reporting. **If an approved project has a change in length, estimated cost or scope, create a new draft as an amendment to the project**.

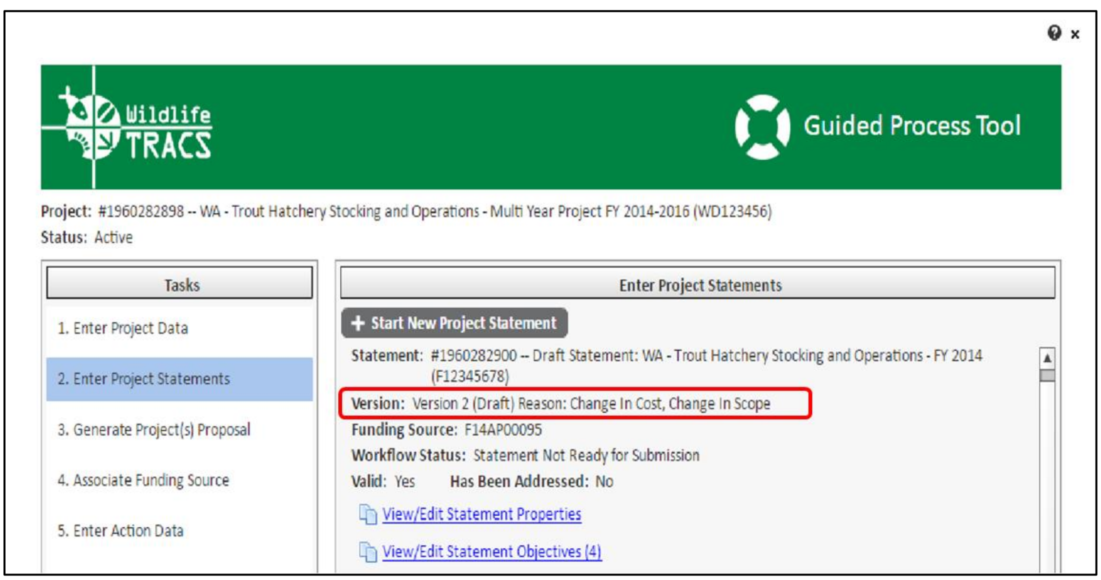
1. To create an amendment, open the Guided Process Tool to Step 2 Enter Project Statement(s) and select Create New Draft on the right side.



2. Select the reason for the amendment by checking the box by Change in Length, Change in Estimated Cost and/or Change in Scope. NOTE: A change in estimated cost alone does not require a new amendment (new draft). Click **Create New Draft**.



3. Make any necessary changes and save. The new draft version will replace the original version. The new draft is a copy of the original project statement, with the version number and reason listed on the right side.



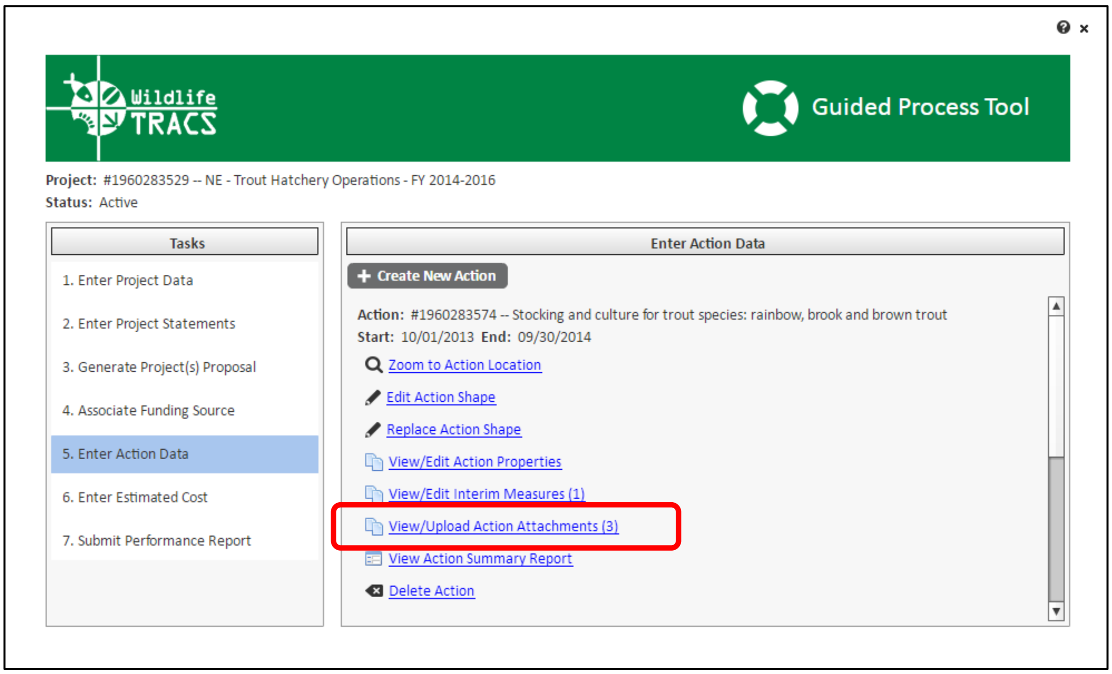
4. The New Draft will need to be sent through the approval workflow again. Once approved, the new draft will be the approved version and the old version will be archived behind the scenes.

Lesson 18: Adding Attachments

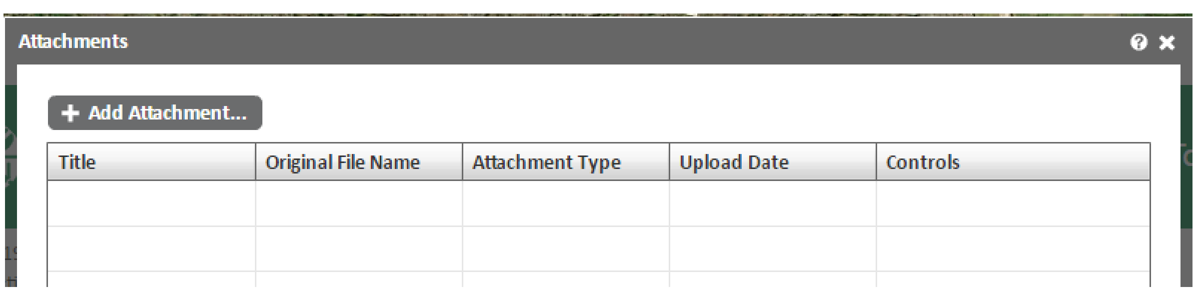
Attachments may be added at the plan, project or action level.

Important Note: Any documents containing Personally Identifiable Information (PII) should **NOT** be uploaded to TRACS. PII information should be redacted if stored in TRACS, or the sensitive documents should be stored only as hard copy in the permanent administrative record. These documents will not automatically transmit to the WSFR Office (but can be accessed within TRACS by other users).

1. From the Guided Process Tool, open **Task 1 Enter Project Data** or **Task 5 Enter Action Data**. Select the **View/Upload Project Attachments** link located in the right panel.

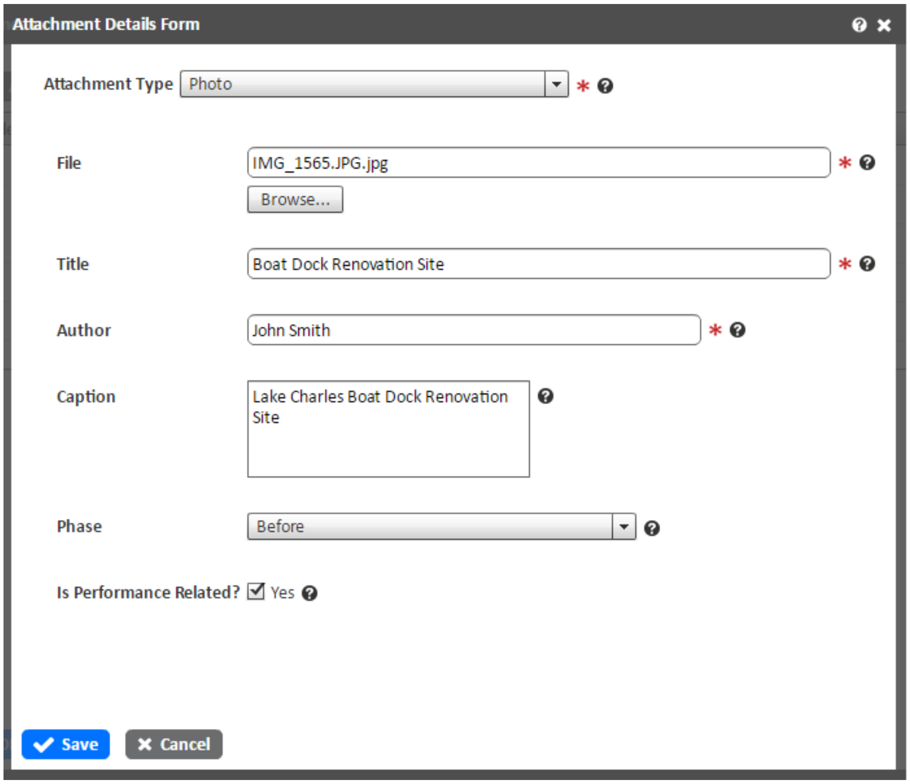


2. Click the Add Attachment button.

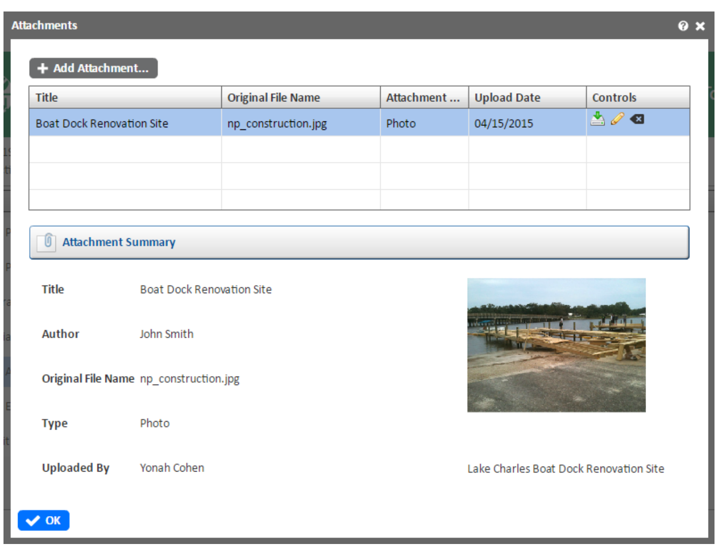


3. Fill out the Attachment Details form:
    - Select the Attachment Type (e.g. document, map, photo, video).
    - Click the Browse button to locate and select the local source file.
    - Enter the Title, Author and Abstract/Caption.

- Indicate if the attachment is **Performance Related** by selecting "Yes." A link to the attachment will be included in the performance report.
- Click the Save button.



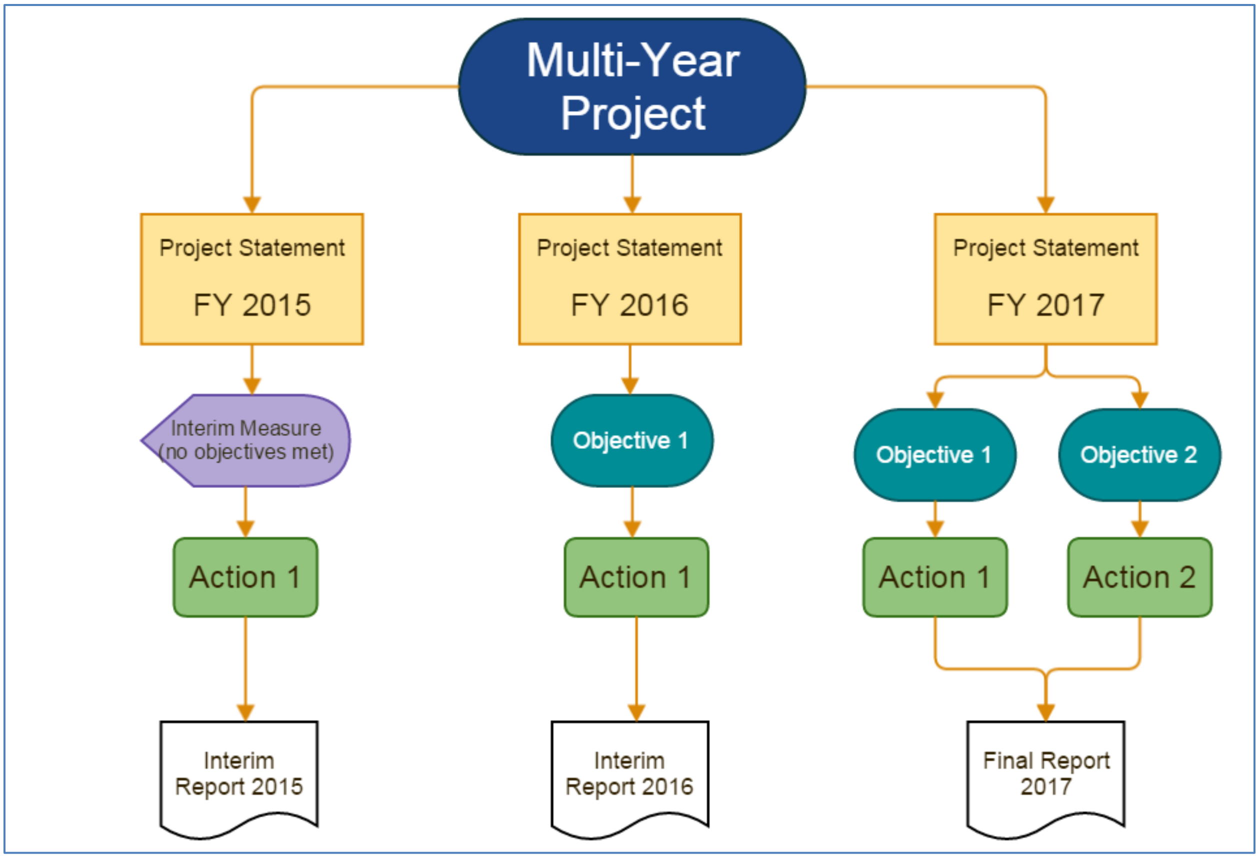
4. The attachment will be listed in the attachment grid once it is successfully uploaded.
   - In the Control column the three controls allow you to download, edit or delete the attachment.
   - Select the attachment to see a summary and preview below.
   - Click **OK** to close the Attachment form.



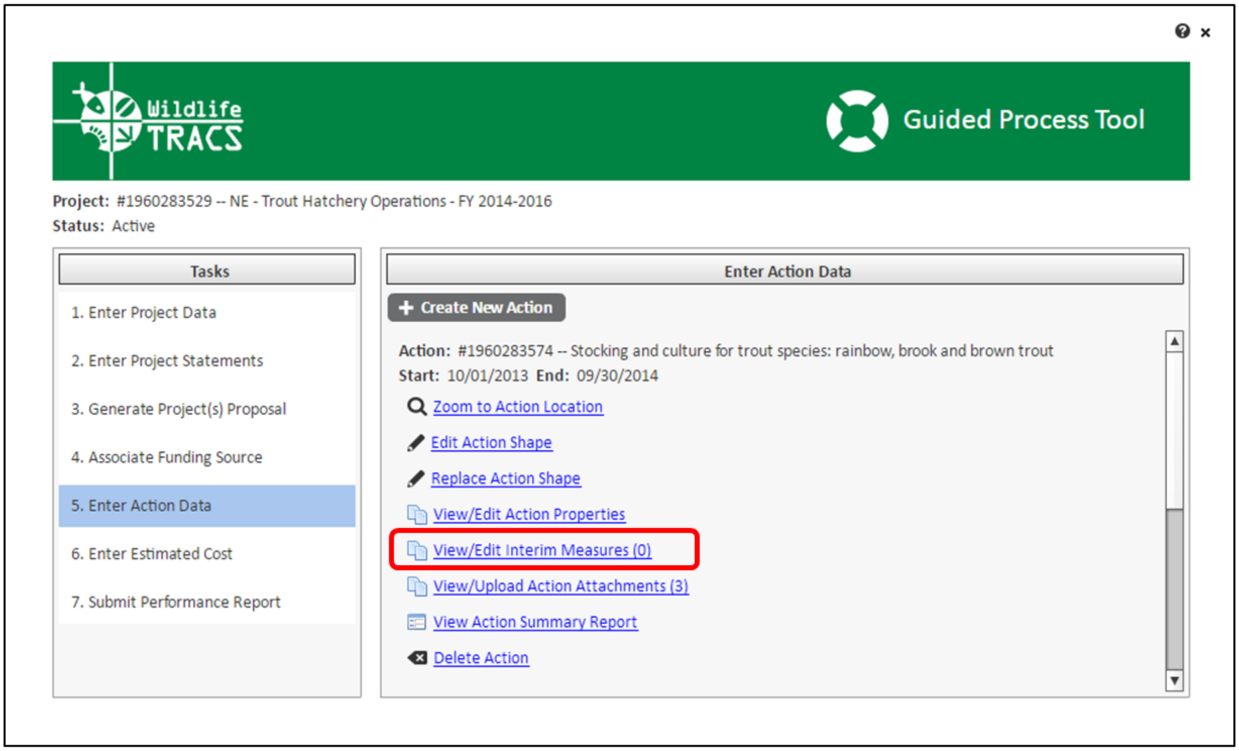
Lesson 19: Interim Measures

An interim is used to document work that does not directly address the primary objectives but demonstrates progress towards completion the project.

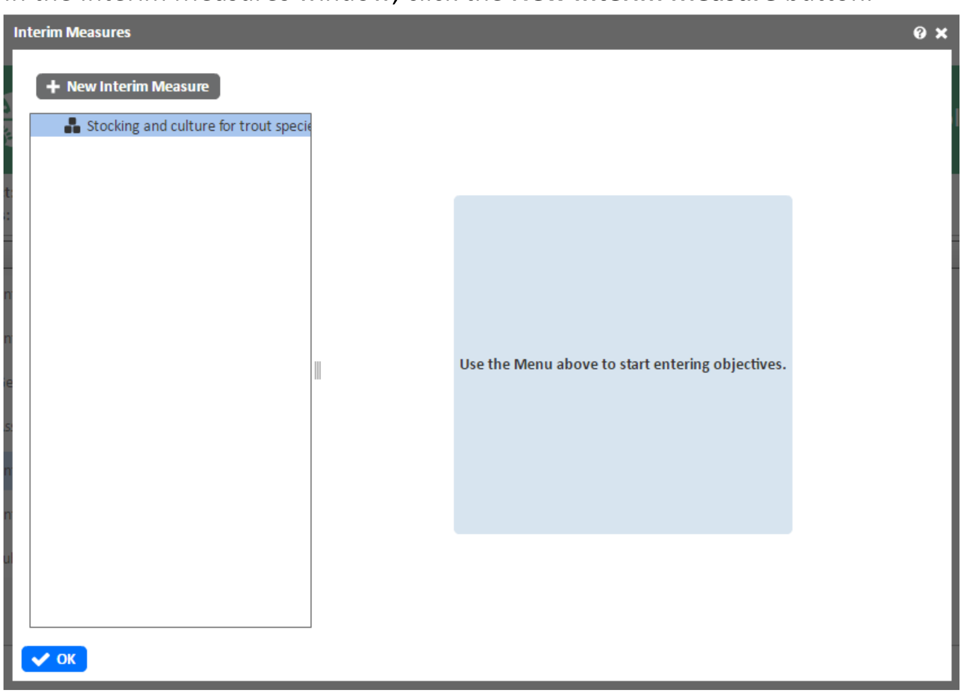
Interim Measures are typically created during multi-year projects. Note: Interim Measures are <u>not</u> related to interim reports.


Multi-Year Project
Project Statement
FY 2015
Project Statement
FY 2016
Project Statement
FY 2017
Interim Measure
(no objectives met)
Objective 1
Objective 1
Objective 2
Action 1
Action 1
Action 1
Action 2
Interim Report 2015
Interim Report 2016
Final Report 2017

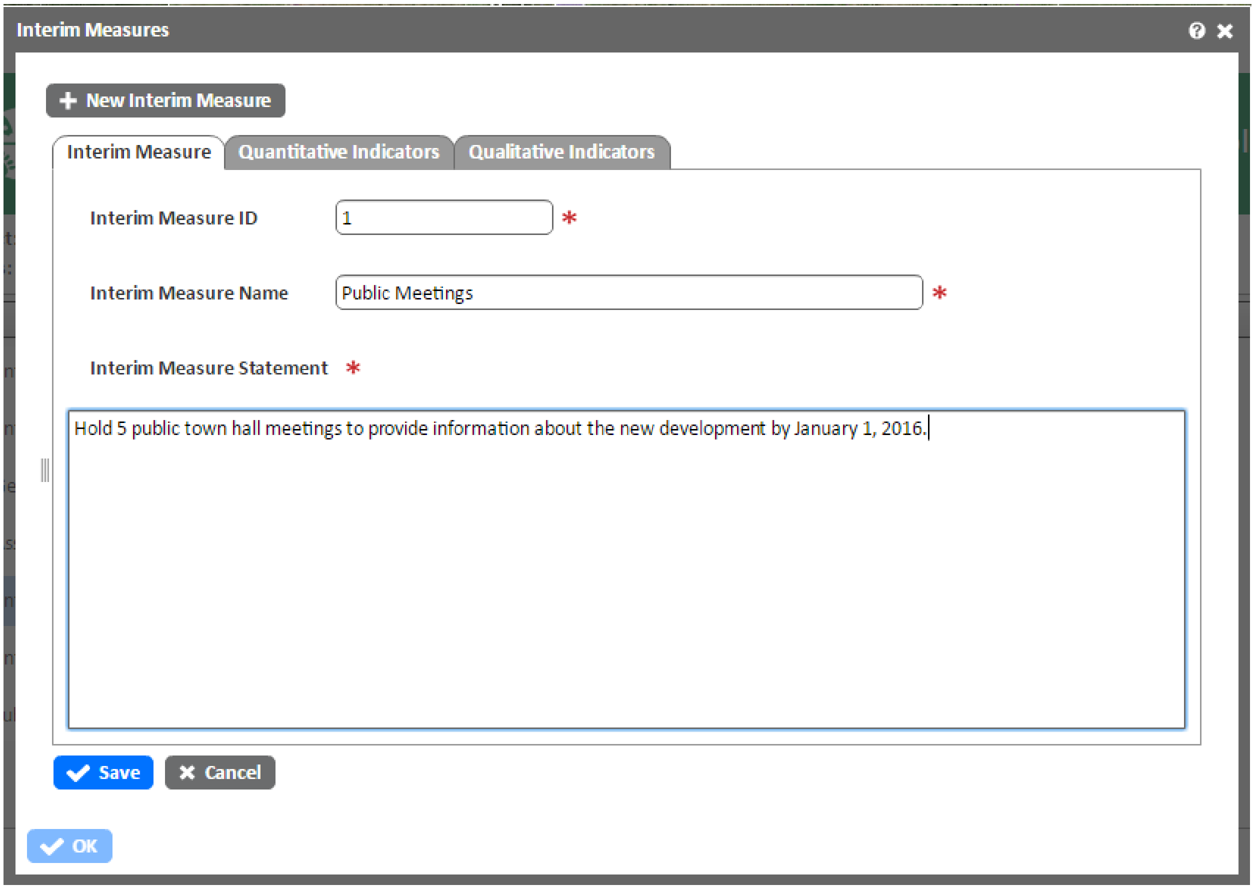
1. The Action will need to be created first. Then, select the View/Edit Interim Measures link in the right pane (Guided Process Tool Step 5: Enter Action Data).



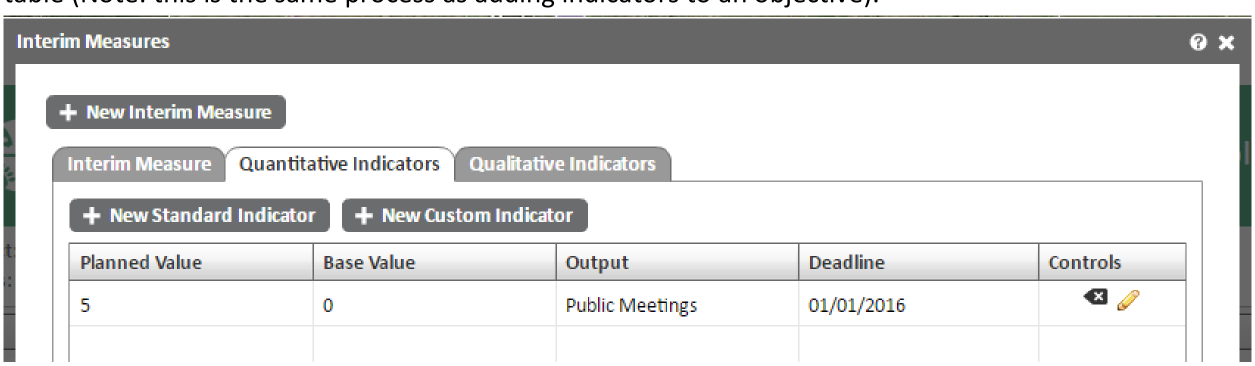
2. In the Interim Measures window, click the **New Interim Measure** button.



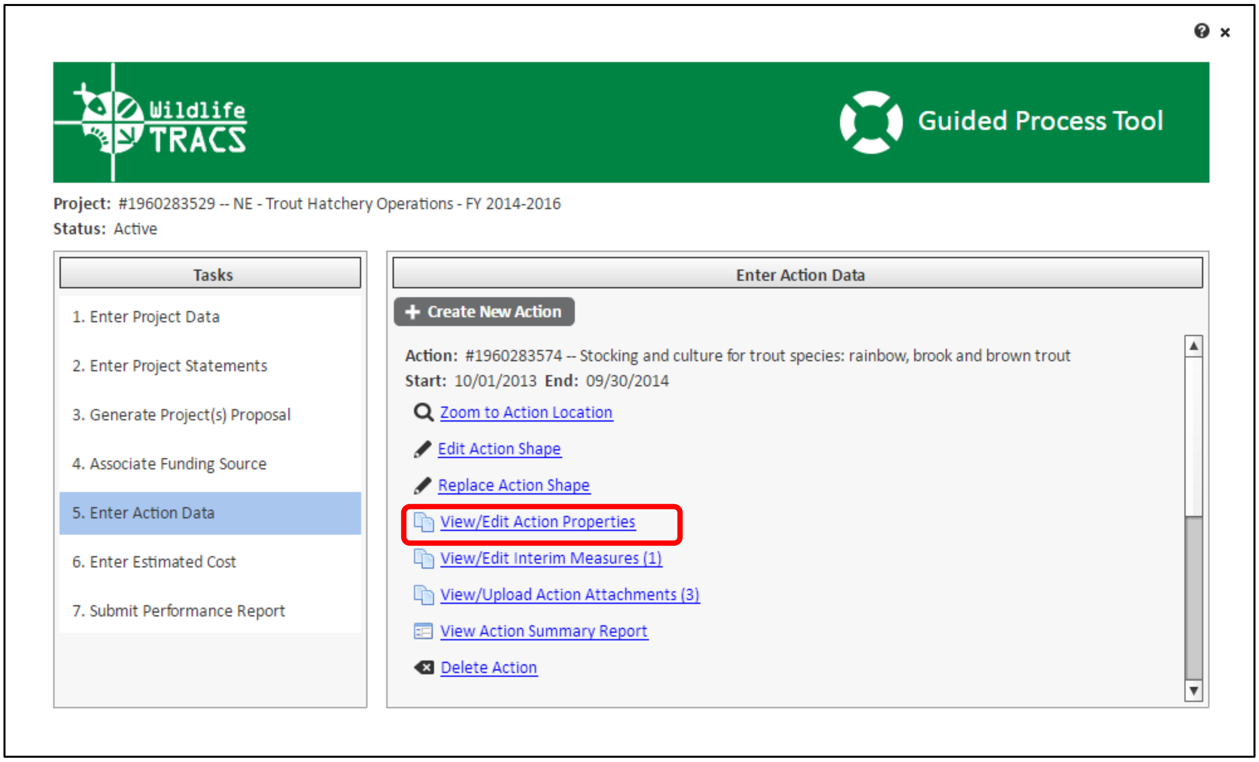
3. Enter the Interim Measure ID, Interim Measure Name, and Interim Measure Statement fields on the first tab.



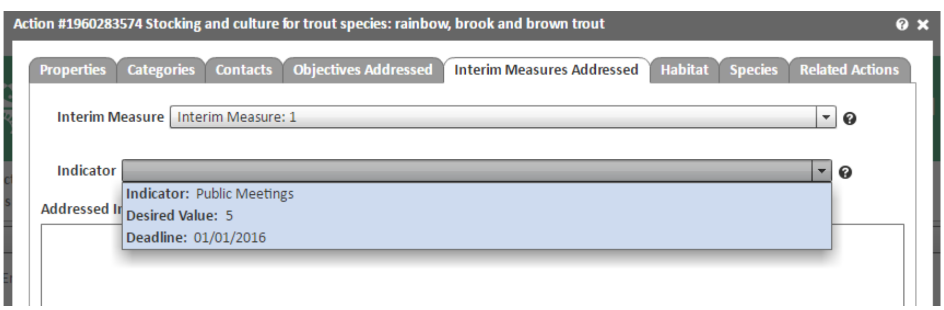
4. Fill out the appropriate indicator tab (qualitative or quantitative) and add the indicator(s) to the table (Note: this is the same process as adding indicators to an objective).



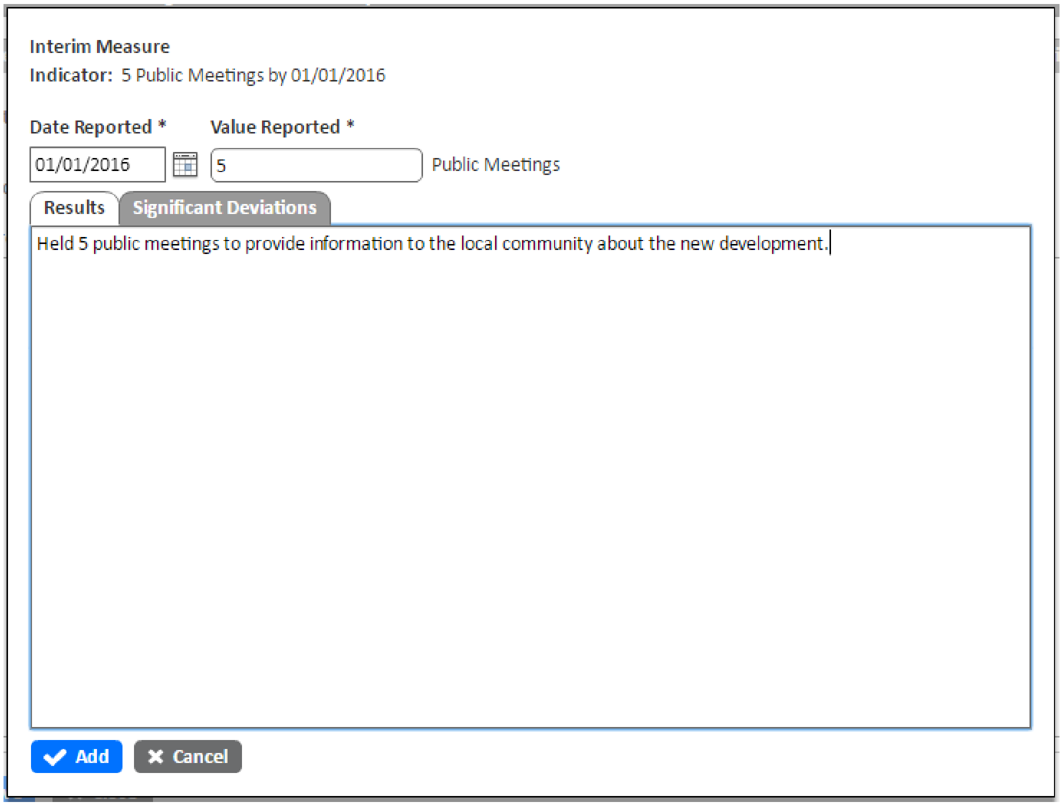
5. Click **Save** and **Close**.
6. Click on View/Edit Action Properties.



7. On the Interim Measures tab:
    - Select a **Project Statement** from the drop down list
    - Select an **Objective** from the drop down list
    - Select an **Indicator** from the drop down list



8. When the pop-up window appears, complete:
    - **Date Reported**
    - **Value Reported** (use **Copy Strategy Value** button on right to copy the value originally entered in the objectives)
    - **Results:** enter narrative of results
    - If an empty box appears on the right, select “True” or “False” from the drop down (appears with qualitative indicators only and is used to determine if the objective was completed)
    - Click over to the **Significant Deviations Tab** to add items, if necessary.
    - Click the **Add** button to add the progress report.



9. Click the **Save** button to save the **Action** form. Click the **OK** button to confirm.

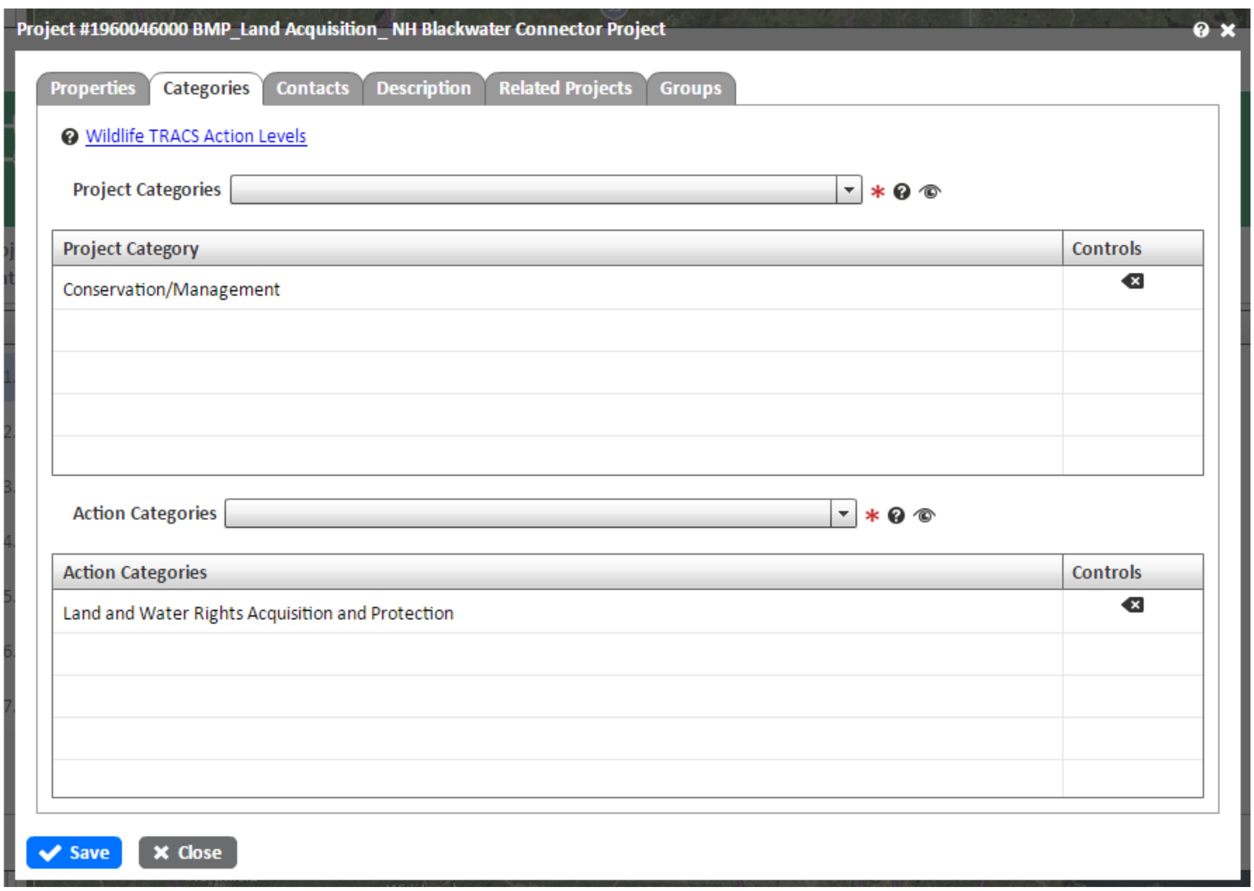
Lesson 20: Lands Data

<u>TRACS is the official repository for data on land and property rights (including water and mineral rights) acquired using federal assistance funding or used as match for federal assistance funding.</u>

Note: Projects with lands data are created in the same way as any other project. This section does not go through the entire project entry process; it just goes through the additional steps required to enter a project with lands data.

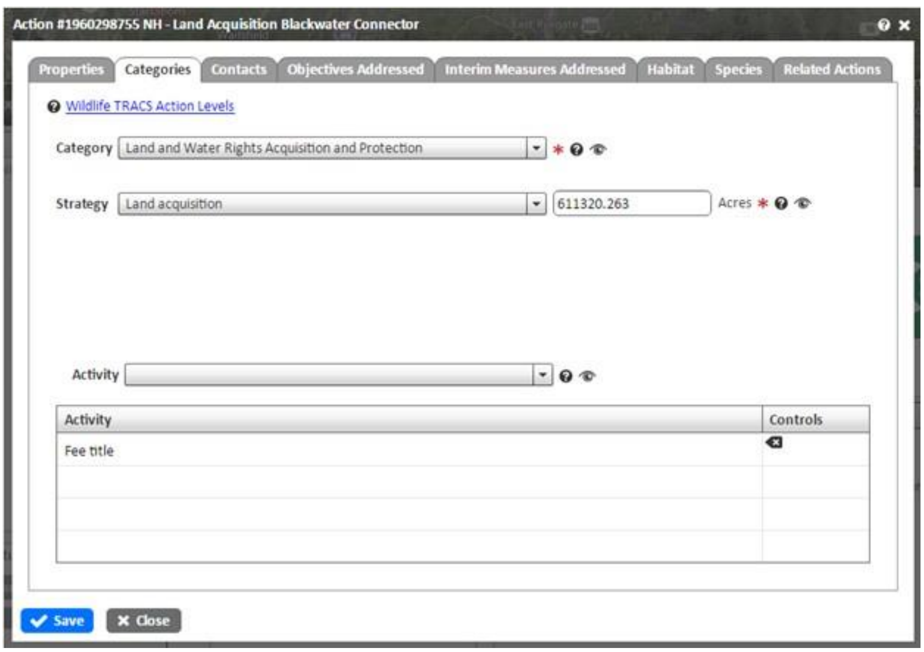
1. On the View/Edit Project Properties window - Properties tab, mark the project as sensitive by checking the box. Is Project Sensitive? ☑

2. On the Categories tab, you MUST select **Land and Water Rights Acquisition** as an Action Category (in the lower half of the screen). This will generate a Land Record form that will need to be filled out later on when entering the actions.



3. Create action(s) for the project that documents the acquisition or donation of land, water rights or mineral rights.
    - **The action polygon must be created with a high degree of accuracy, e.g. it must match the deed or real land acquired.** The system requires a <5% margin of accuracy to meet auditing policies for Land Reconciliation. Land Reconciliation audits look at difference between reported and actual land acquired and state vs. federal records. Inaccuracies may occur when the shapefile does not match the actual deed such as when a new survey is not reported, additional land is acquired or less land is acquired than expected. If a discrepancy occurs, the polygon in TRACS must be adjusted to match the actual land acquired (deeded).

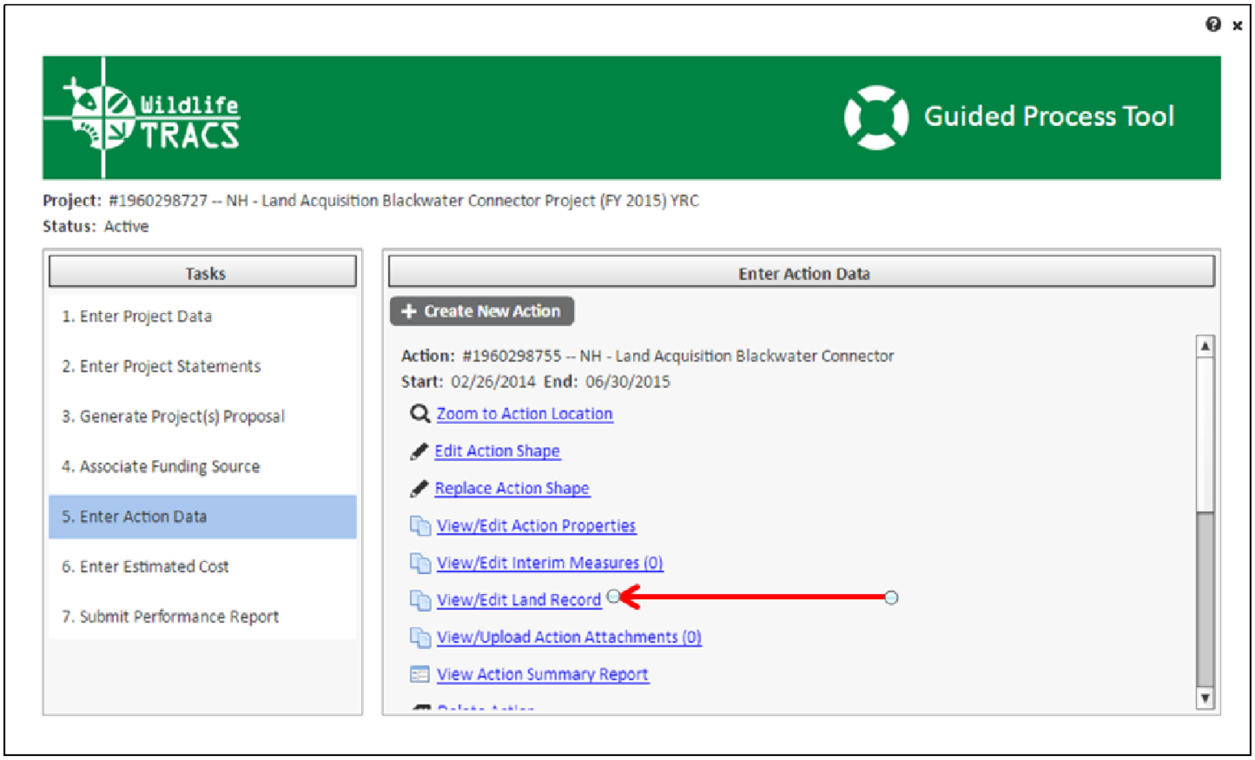
4. On the Categories tab, fill out the Category and Strategy fields, then select the Activity (if applicable) as either fee title or non-fee title. Note: The strategy box will auto populate the measurement based on the action polygon (measurement is standardized to the U.S. measurement system with acres and feet only).



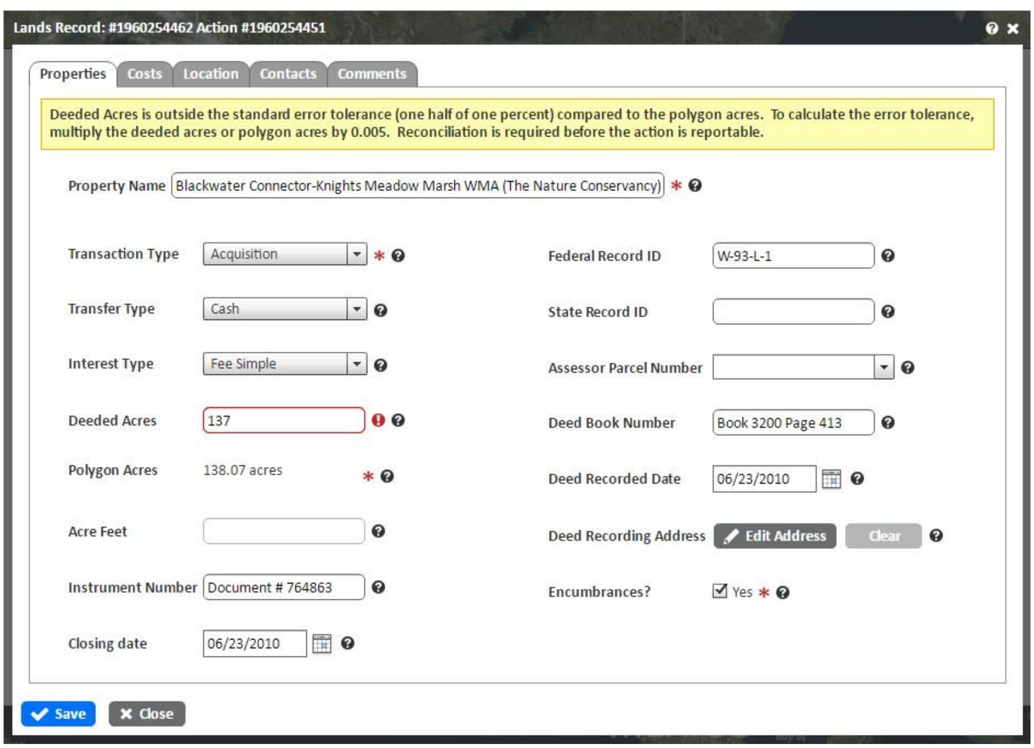
5. Continue entering the action data including the Habitat and/or Species tabs if applicable. Then click **Save** and **Close**.

6. On the Guided Process Tool, go to Task 6: Enter Estimated Cost and fill out the estimated costs. Note: This step is required before going back to fill out the Land Record form cost tab.

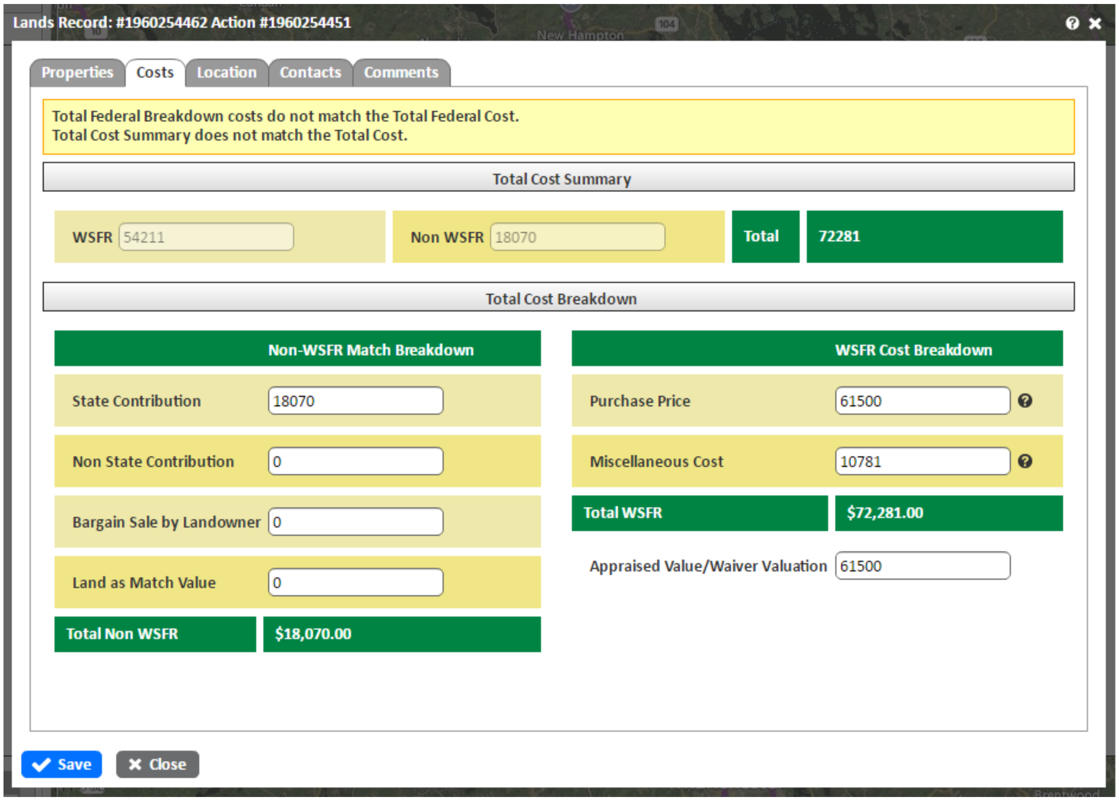
7. On the Guided Process Tool, go back to Task 5: Enter Action Data and select View/Edit Land Record.



8. On the Land Record form, fill out all required fields.
    - Fill out the Properties tab:

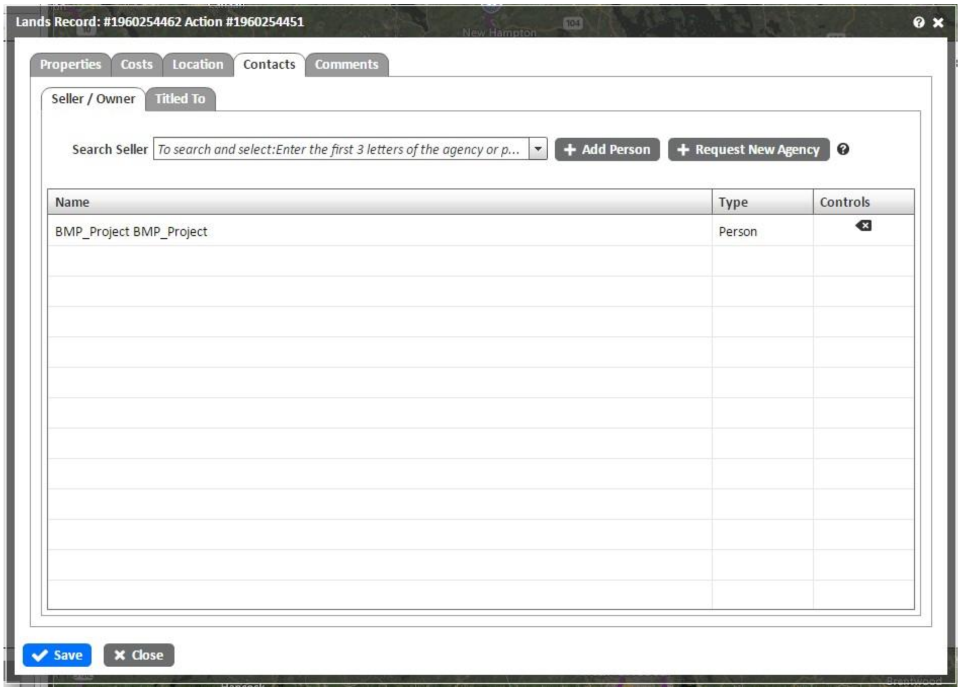


- Fill out the Costs tab (note: the Estimated Costs on the Guided Process Tool must be filled out first before entering this section).

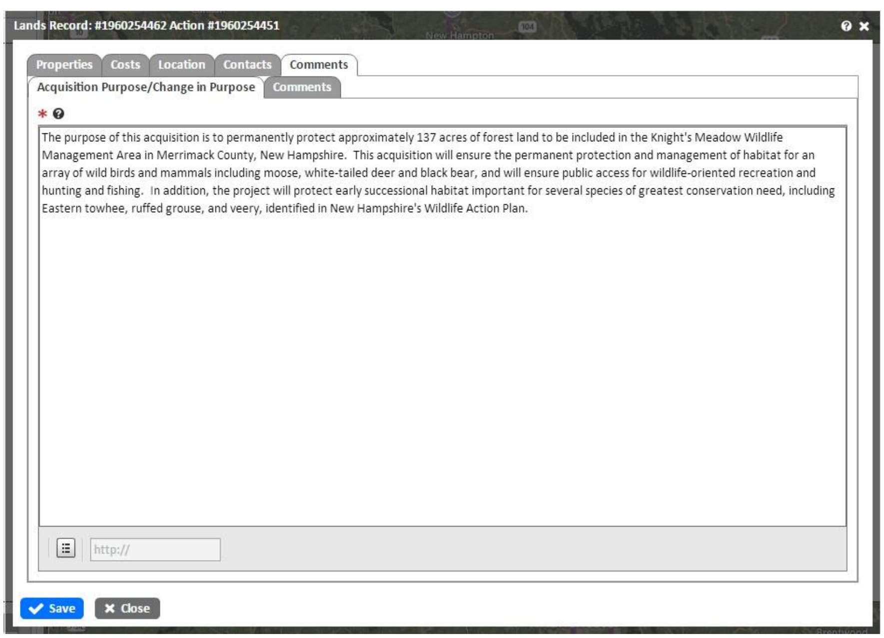


- Location tab: fill out the Address tab, Legal Description tab and Survey tab (if available)

- Contacts tab



- Comments tab:
    - Acquisition Purpose/Change in Purpose is required. The purpose of the comment field is to specifically identify the purpose of an individual parcel. This information can be copied and pasted from the Project Statement Need field but may need to be further refined.



- Click **Save** and **Close**

9. Back on the Guided Process Tool, attachments can be added at the action level to store documents (deeds, legal notices, legal descriptions, parcel maps, etc.) pertaining to the completed acquisition(s). TRACS can be used as place to store part of the permanent digital record.
    - Important Note: Any documents containing Personally Identifiable Information (PII) should NOT be uploaded to TRACS. Either PII information should be redacted, if it is to be stored in TRACS, or the sensitive documents should be stored as hard copy in the permanent administrative record. These documents will NOT automatically transmit to the WSFR Office. Hard copies of all land acquisition documents will still need to be sent to the WSFR Regional Office to be maintained as part of the permanent administrative record. The hard copy records maintained by the Regional WSFR Offices are the official repository for land acquisition records.

Lesson 21: Advanced Dashboard Tools

This chapter contains content for Lesson 21 Advanced Dashboard Tools which covers some additional functionality in TRACS that is not required to enter a basic project.

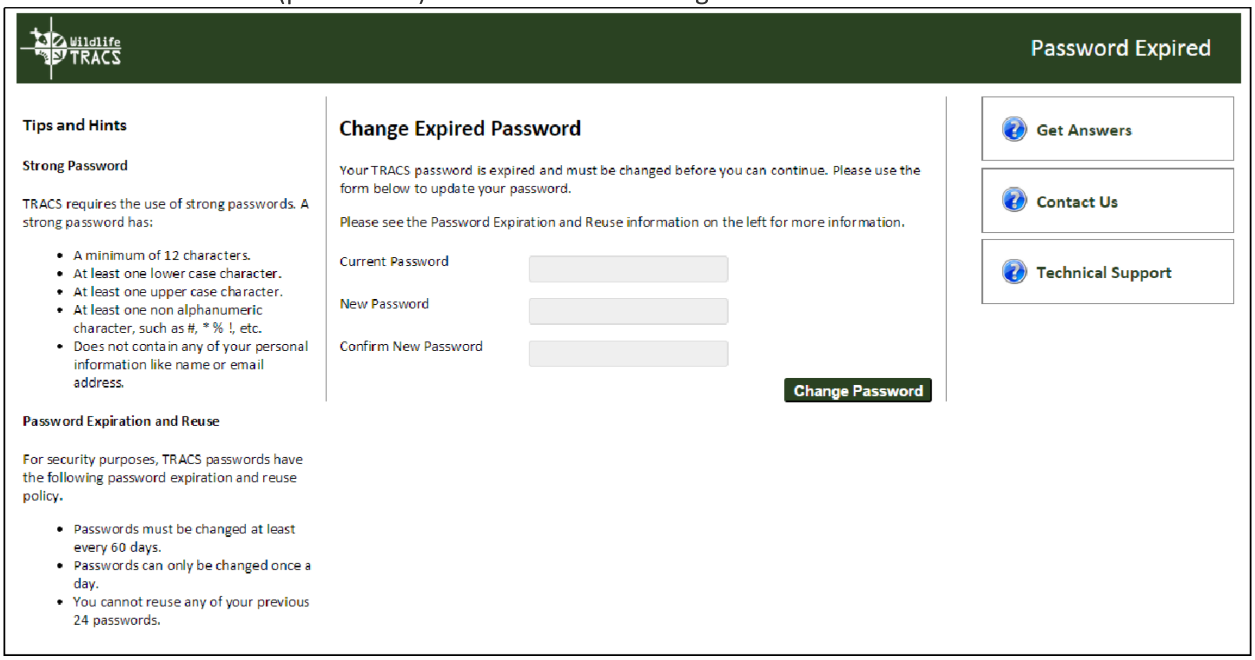
These include:

- Updating your Profile and Password
- Workflow Manager
- FBMS Reports

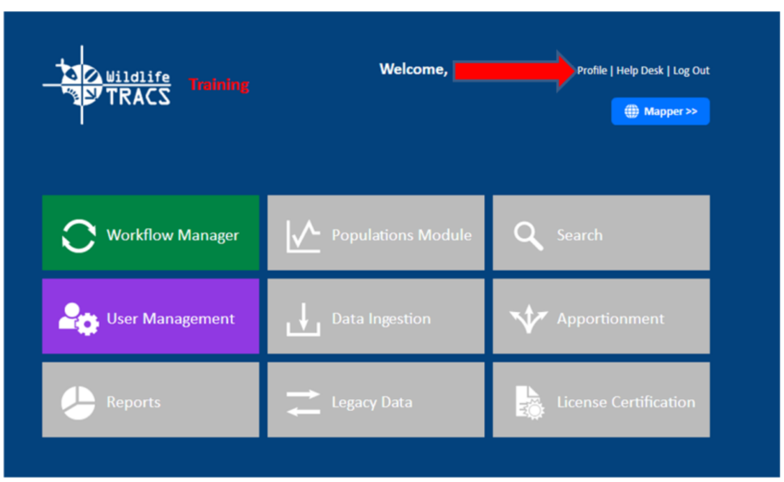
Updating you Profile and Password

For security purposes, TRACS passwords have the following password expiration and reuse policy:

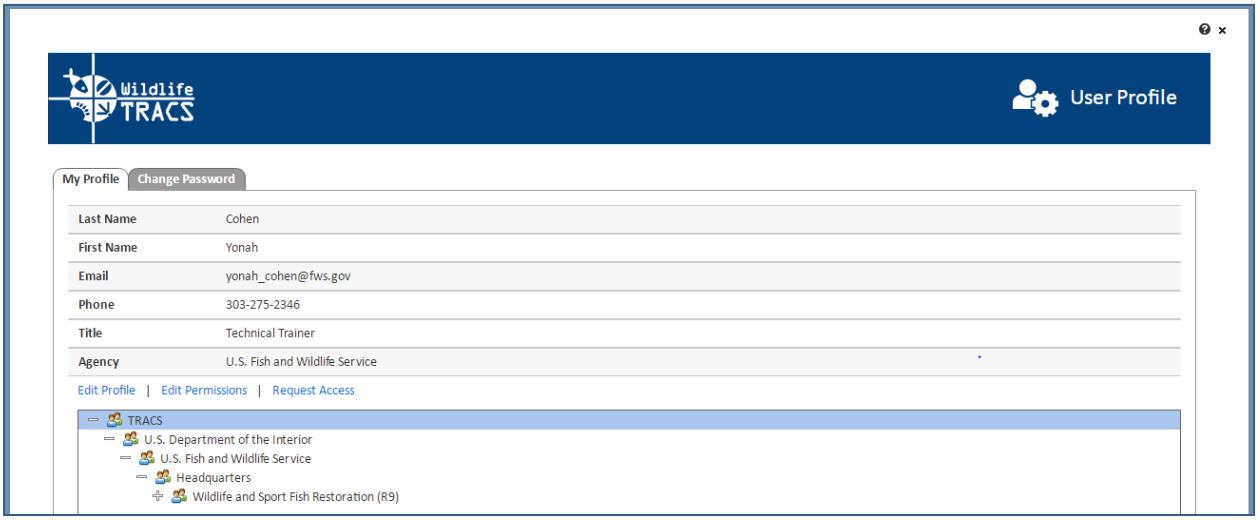
- Passwords must be changed at least every 60 days. Passwords can only be changed once a day.
- You cannot reuse any of your previous 24 passwords.
- If 60 days or more has passed since your password has been changed, you will be prompted to create a new password the next time you try to log in to the TRACS site. This will occur for both the TRACS live (production) site and TRACS training site.



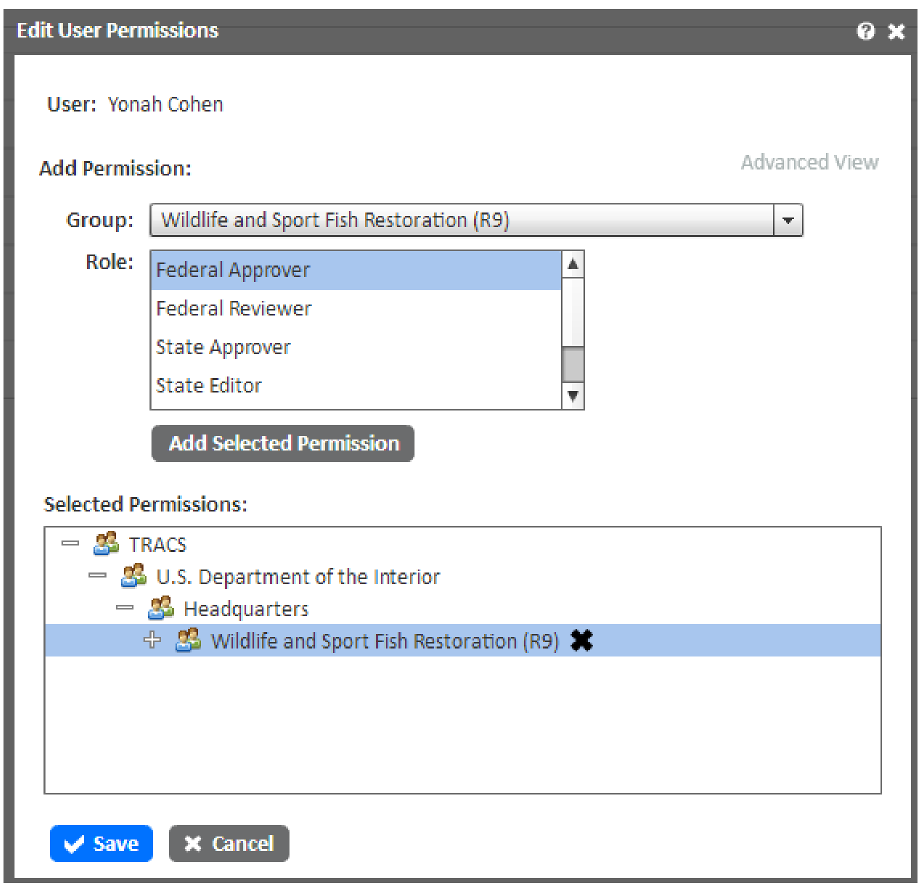
Users can update their own profile, request additional permissions and reset their passwords using the TRACS Dashboard **Profile** tool. A current password is required and the user account must be active. Select the **Profile** link located to the right of your username at the top of the screen.



On the **My Profile** tab, you can view your own profile information including name, phone, title, and agency. Click the **Edit Profile** link to update this information. You user role and permissions are displayed in the box on the lower half of the screen. Select the **+** sign to expand the view.

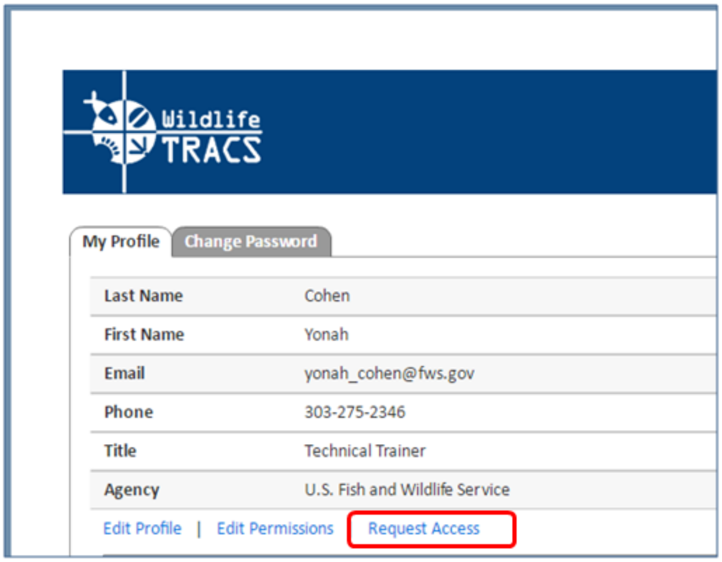


User Administrators Only: From the **My Profile** tab, click the **Edit Permissions** link to select additional permission for your assigned group (e.g., State Editor, State Reviewer, State Approver, Federal Reviewer, Federal Approver). Click **Add Selected Permission**.

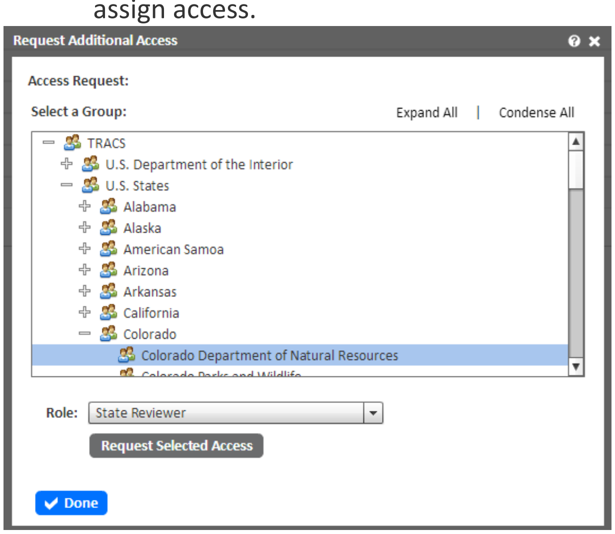


To Request Additional Access:

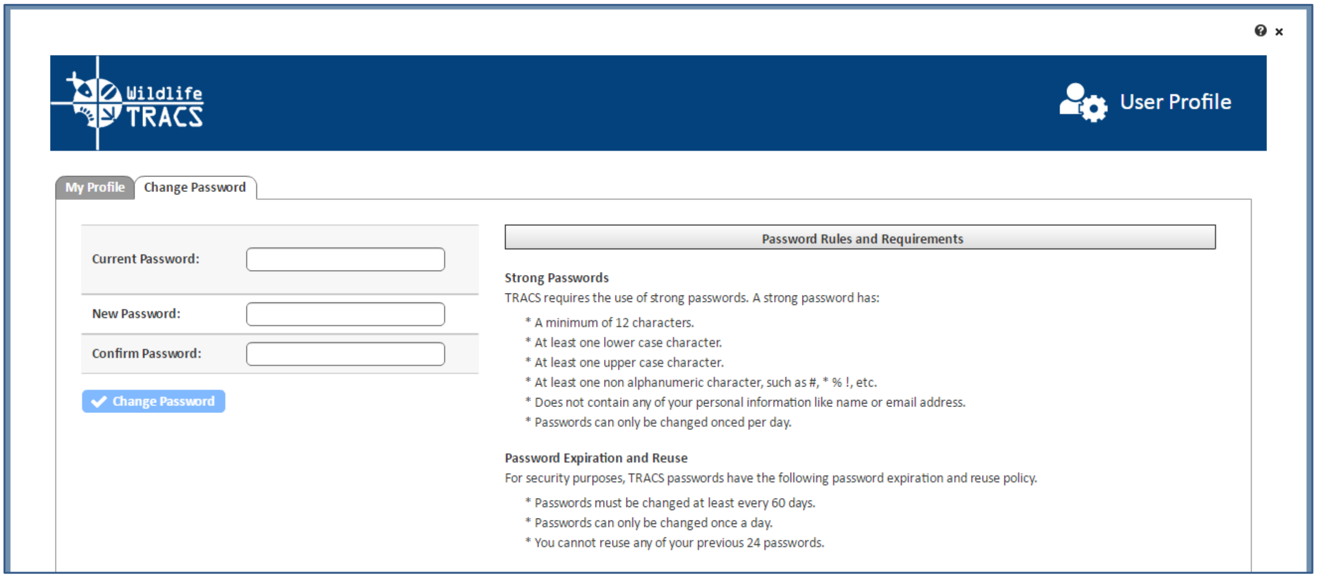
- From the **My Profile** tab, click the **Request Access** link.



- In the select a group window, click the + sign by TRACS and each submenu (or click Expand All) and select your group.
- Then select the role you need from the drop down menu.
- Click **Request Selected Access** and **Done**. The User Administrator will review the request and assign access.



To update your password, select the **Change Password** tab, enter your current password, new password and confirm your password. Select the **Change Password** button.



<u>The requirement for passwords is set by DOI policy:</u> Policy requires a 15 minute lockout after 5 failed attempts to enter a password. We recommend waiting 20 minutes because the 15 minute lockout period resets if another failed attempt occurs during the lockout period.

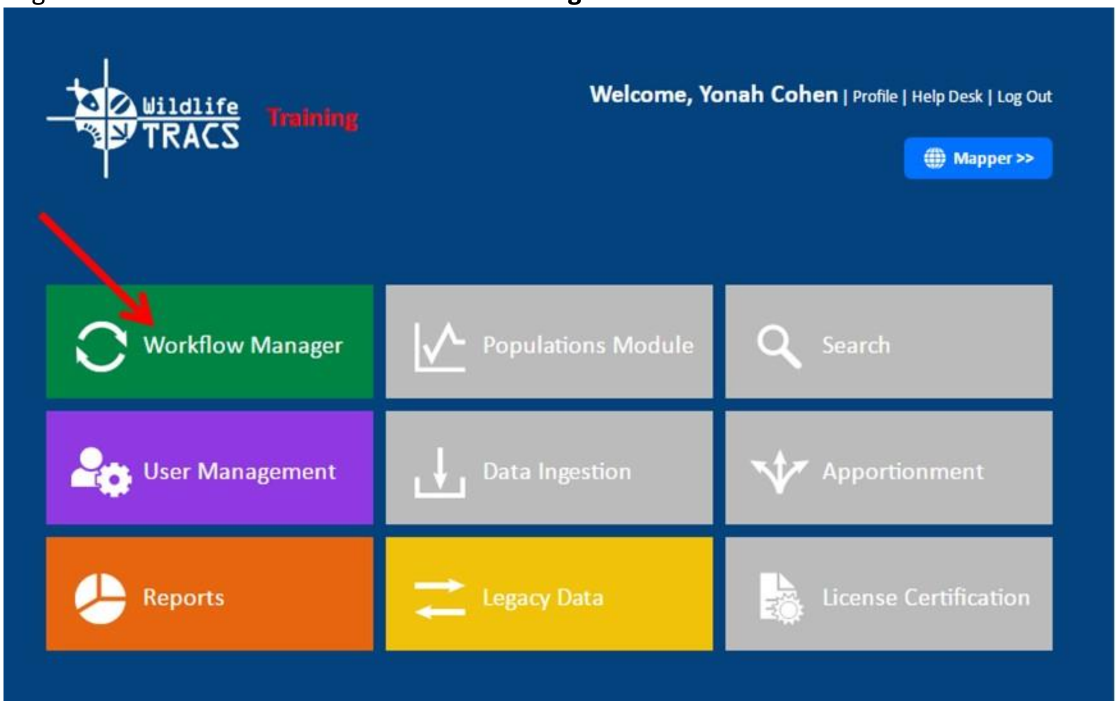
Passwords can only be reset once within a 24 hour period. This requirement can be overridden by modifying the password directly in the database; however, this requires assistance from the Help Desk. Passwords must be changed every 60 days and must be unique compared to the previous 24 passwords used. Any change to a password constitutes a unique password (i.e. changing a single character or digit constitutes a new unique password).

Workflow Manager

The Workflow Manager is used to manage the project proposal and performance report workflows for one or more projects.

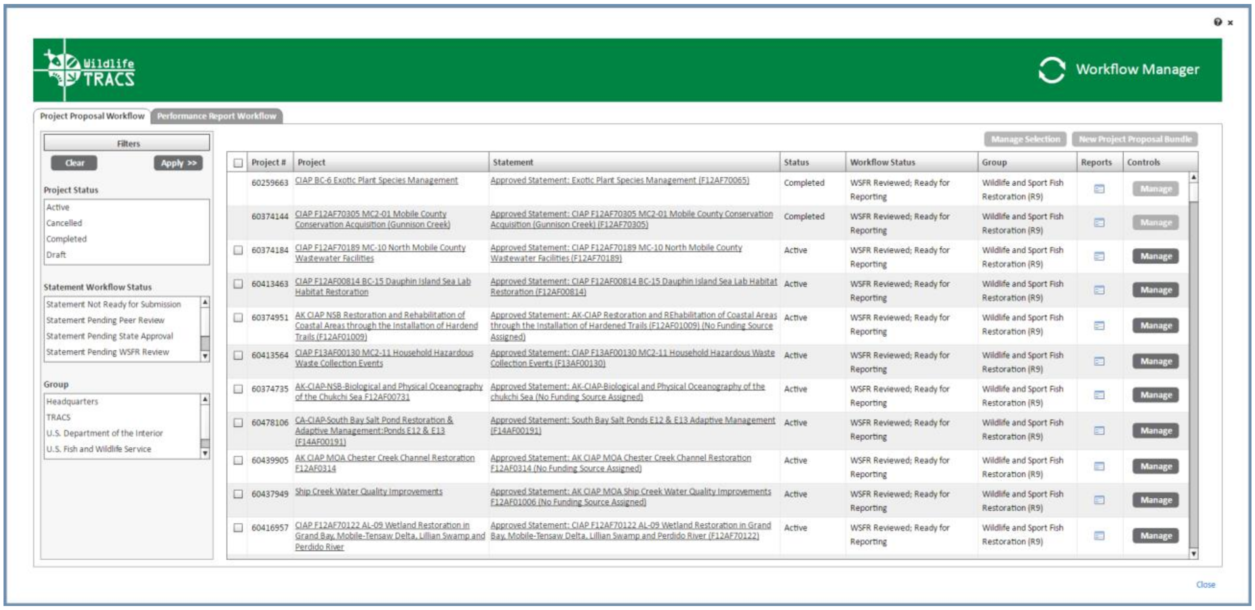
The Workflow Manager can be used to submit the project proposal or performance report through the review and approval process (based on the user's role and permissions).This is the same workflow that is available through the Guided Process Tool.

Log in to TRACS and select the **Workflow Manager** icon from the Dashboard.



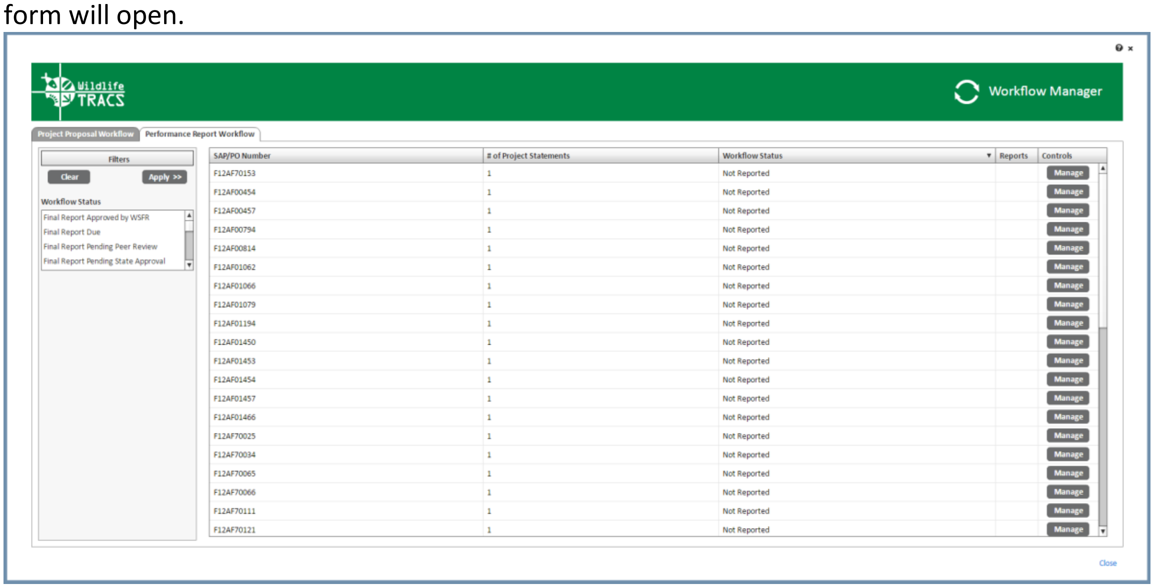
On the **Project Proposal Workflow** tab, select one or more filters on the left side bar and click **Apply**. To select more than one item hold down the Shift key (contiguous) or Ctrl key (non-contiguous). Click Clear to remove all filters.

To manage multiple projects, check the box for the project(s) to include and click **Manage Selection**. The workflow form will open for the selected projects. Click on the project name or statement name to open the corresponding form. To work with an individual project, select **Manage** in the controls column. The workflow form will open for the selected project.



On the **Performance Report Workflow** tab, select one or more filters on the left side bar and click **Apply**. To select more than one item hold down the Shift key (contiguous) or Ctrl key (non-contiguous). Click Clear to remove all filters.

Reports are organized by the SAP/PO Number and will list the number of project statements attached. To view a report, select the report icon. Click **Manage** on the right side and the Performance Workflow form will open.



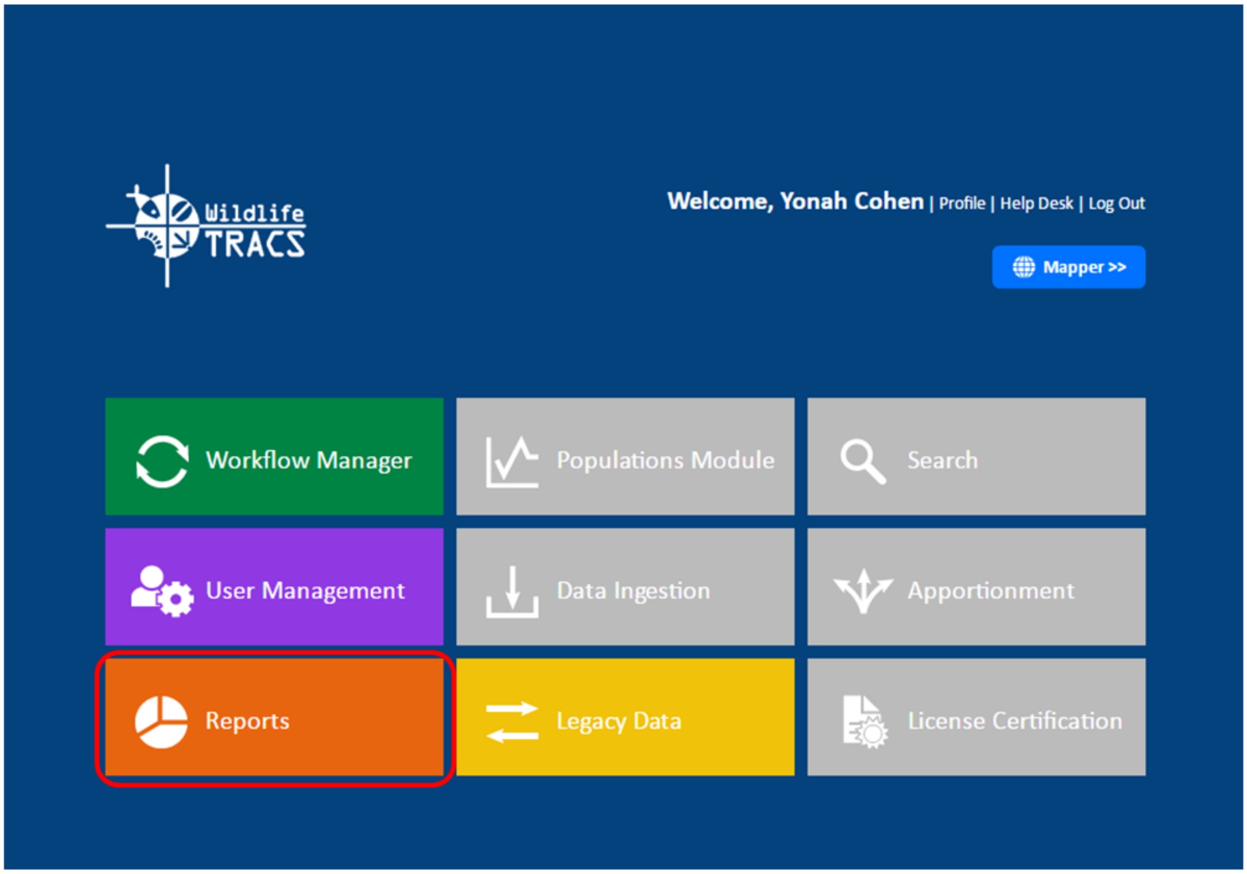
To close the window, click the **Close** button in the lower right or the **x** in the upper right.

FBMS Reports

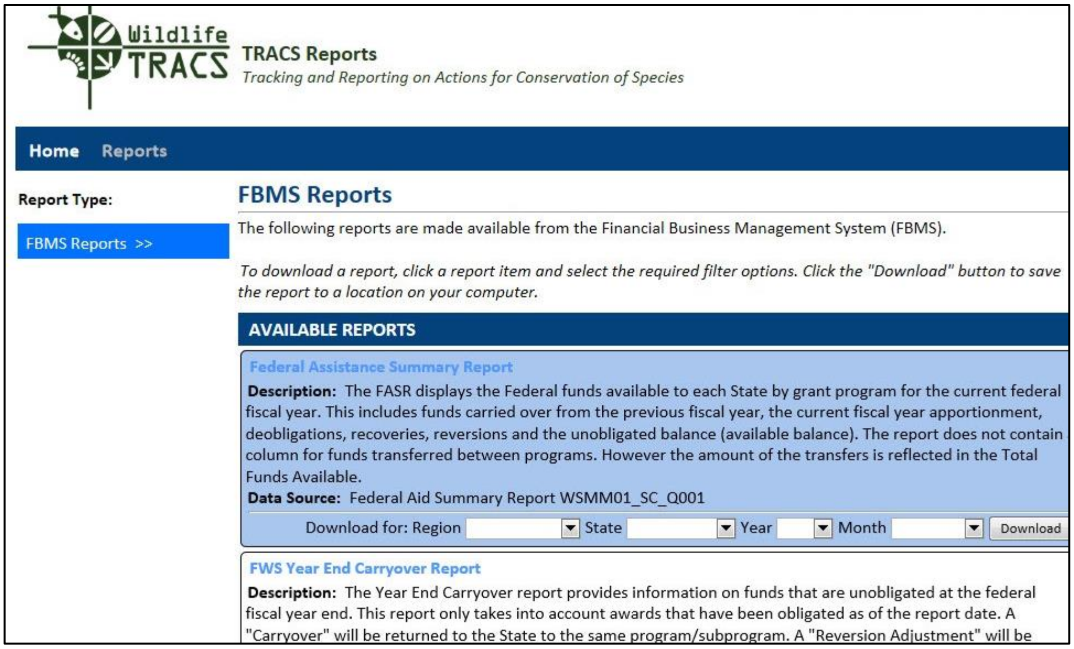
How do I access and download FBMS reports?

You must have a TRACS user account to access the FBMS Reports. Login to TRACS at https://tracs.fws.gov/data_tracs/dt/dashboard

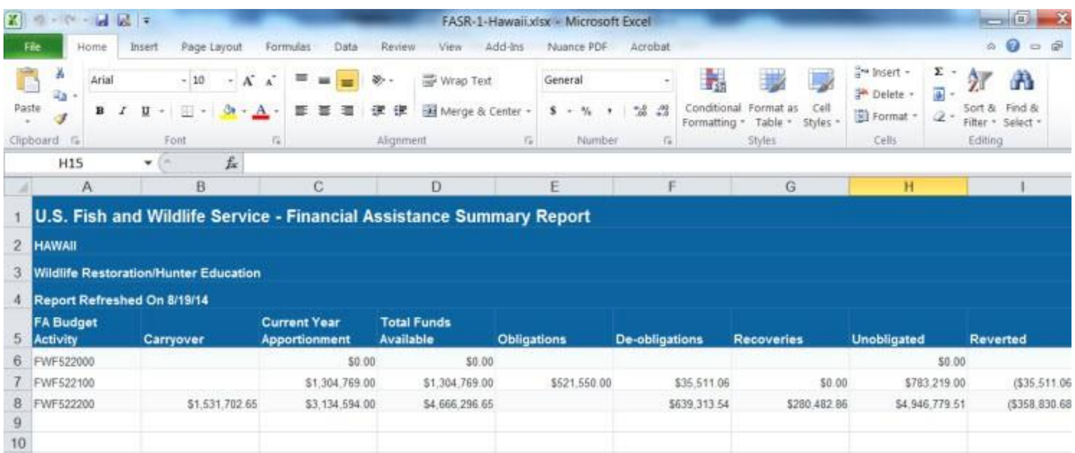
The **TRACS Dashboard** is displayed. This is a central point of access to the application. The Dashboard consists of modules, tools, reports and functions. Select the **Reports module**.



Click on the report you want to access under Available Reports. In the **Download For** section, select the Region, State, Year, and Month from drop-down boxes. Click the **Download** button.



You will receive a message asking to open or save the report. The report will open in Excel. **Save** the report to your computer.



__Report Information:__
Below is information about each report available for download (as Excel Spreadsheet).

Federal Assistance Summary Report (FASR)
The FASR displays the Federal funds available to each State by grant program for the current federal fiscal year. This includes funds carried over from the previous fiscal year, the current fiscal year apportionment, de-obligations, recoveries, reversions and the unobligated balance (available balance). The report does not contain a column for funds transferred between programs. Transfers between programs are reflected in the Total Funds Available.

Milestone Plan Report (MP)

The MP Report provides reporting due dates for all open awards. A milestone plan is created for each award (grant) to track receipt, extensions and due dates for both interim and final Federal Financial Reports (SF-425s) and performance reports. Completed milestones (reports already received) are not displayed on this report. There is one MP Report for each Region that can be filtered to display a specific recipient or award.

Obligation and Expenditure Status Report (OESR)
The OESR provides a listing of the sum of obligations and payments for each award/line number for open awards by State.

Obligation and Payment Report (O&P)
The O&P Report provides a listing of obligation and payment transactions for open awards by recipient, by award and by line number with summary totals.

Safety Margin Report (SM)
The SM Report provides previous years beginning safety margins and current ending safety margins for each year by program.

Subsidiary Ledger Detail Report
The Subsidiary Ledger Detail Report provides a list of obligations, de-obligations, recoveries and reversions by grant program for the current federal fiscal year.

FWS Safety Margin Simulation
The Safety Margin (SM) Simulation report calculates the safety margin for the current fiscal year based on obligations as of the date of the report.

FWS Year End Carryover Report
The Year End Carryover report provides information on funds that are unobligated at the federal fiscal year end. This report only takes into account awards that have been obligated as of the report date. A "Carryover" will be returned to the State to the same program/subprogram. A "Reversion Adjustment" will be returned to the State within the same program but a different subprogram. A "Reversion" is funds that exceeded the two-year period of authority/availability for Wildlife Restoration, Sport Fish Restoration or State Wildlife or five-year period of authority/availability for Boating Access. The reverted funds are returned to the Service in accordance with the Wildlife or Sport Fish Restoration Acts, and State Wildlife Grant Program.

Legacy Data

In order to reduce data entry for TRACS users, relevant FAIMS data was migrated to TRACS. Legacy data is defined as FAIMS data that included a Project and/or Accomplishment record. If a grant had no project or accomplishment data in FAIMS, the grant level information was not converted to TRACS.

Only WSFR staff have the ability to access and update legacy records in TRACS. WSFR staff are responsible for closing out open legacy records by completing any missing fields.

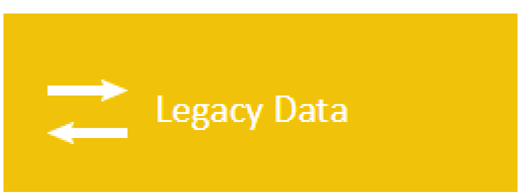
To complete data entry for a TRACS legacy project, the following steps are required at minimum:

- Project data should be reviewed to ensure that Project and Action categories are populated. (Step 1. Enter Project Data)
- Project Statements should be reviewed to determine which segments are not addressed by Actions. (Step 2. Enter Project Statements)
- Performance information should be entered as Actions associated with the appropriate Project Statement. (Step 5. Enter Action Data)
- Estimated cost should be entered for each Action on the Estimated Cost form. (Step 6. Enter Estimated Cost)
- The Project Status should be set to 'Completed' on the Project Properties form. (Step 1. Enter Project Data)

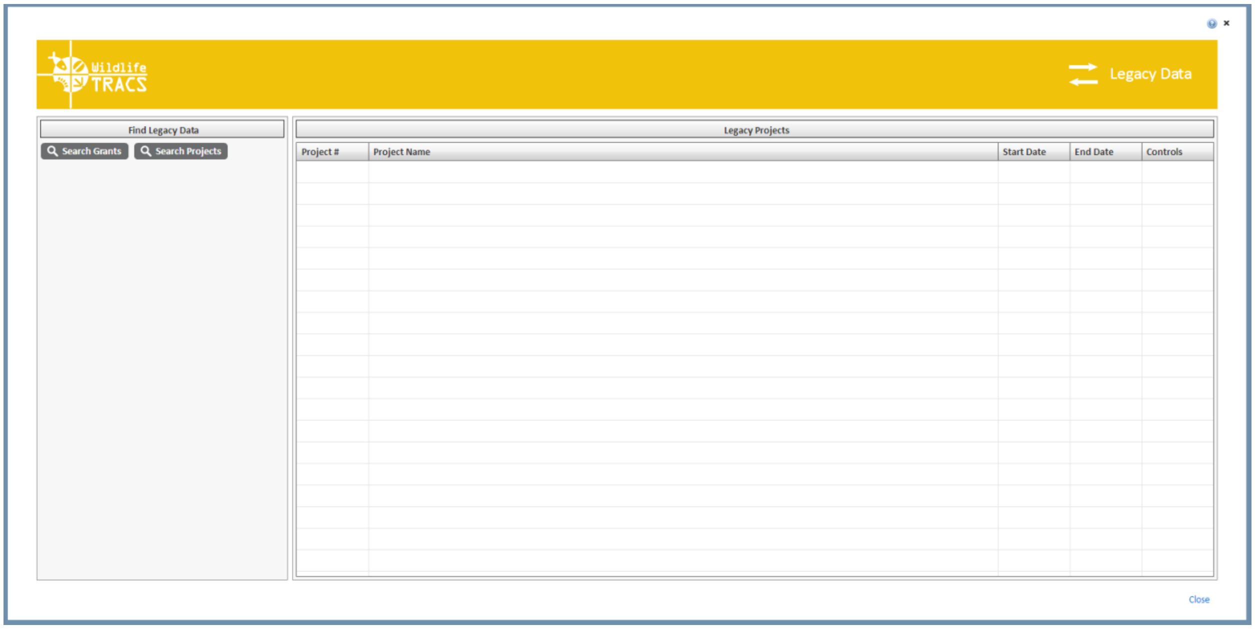
Certain legacy reporting scenarios may require creation of additional Project Statements to reflect new Grant segments, or creation of a new Project Statement version to reflect an Amendment. This can be achieved using the tools available under "Step. 2 Enter Project Statements" in the Guided Process Tool.

Locating a Legacy Project

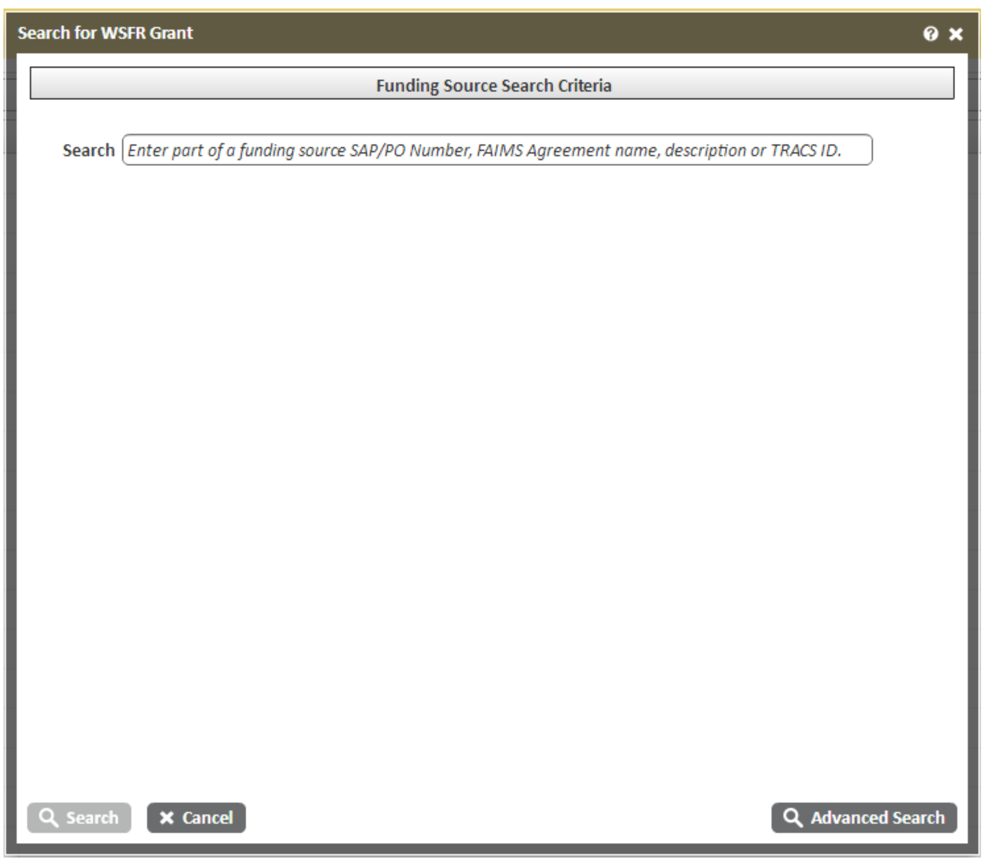
Select **Legacy Data** located on the **TRACS Dashboard**.



Select the **Search Grants** (Simple Search) button. (Note: The Project Search option is available as well, which will open the Guided Process Tool search window).

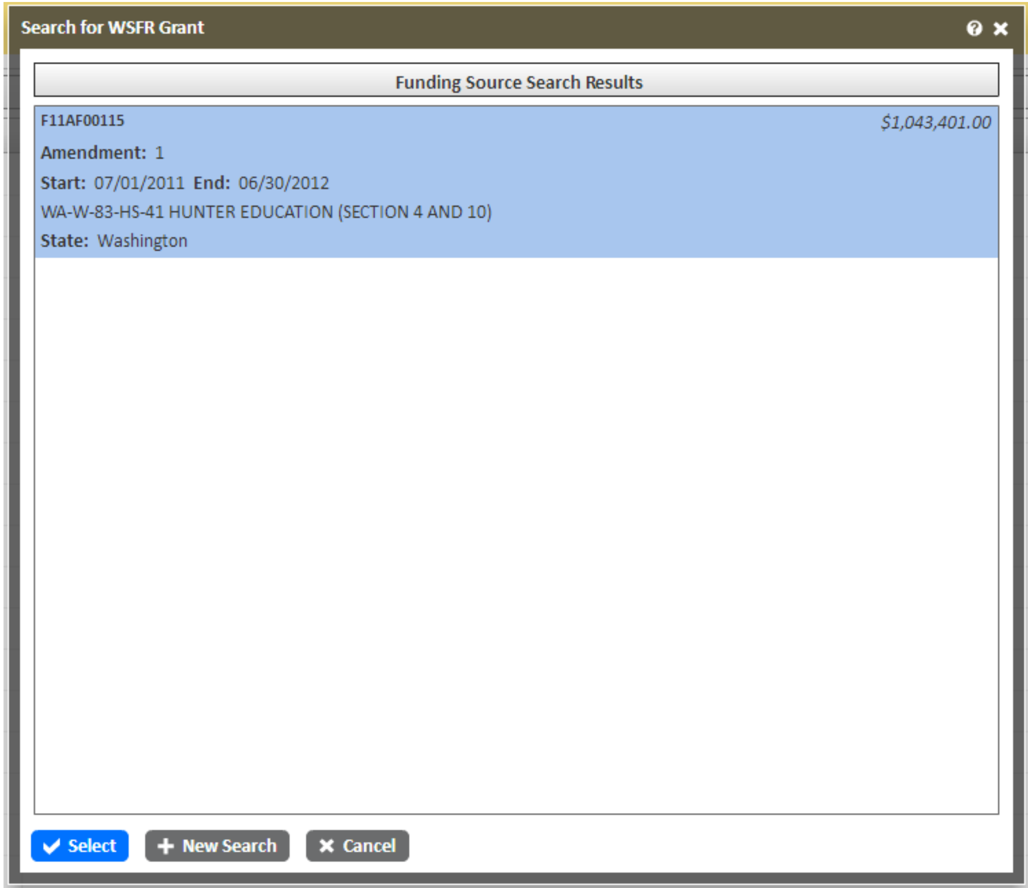


Enter part of a funding source SAP/PO Number, FAIMS Agreement name, description (e.g., WA-W-83-HS-41 or F11AF00115).



Select the **Search** button located in bottom left hand corner. The **Advanced Search** button in the bottom right hand corner can be used to narrow search results by description, grant program, state, dollar amount and amendment.

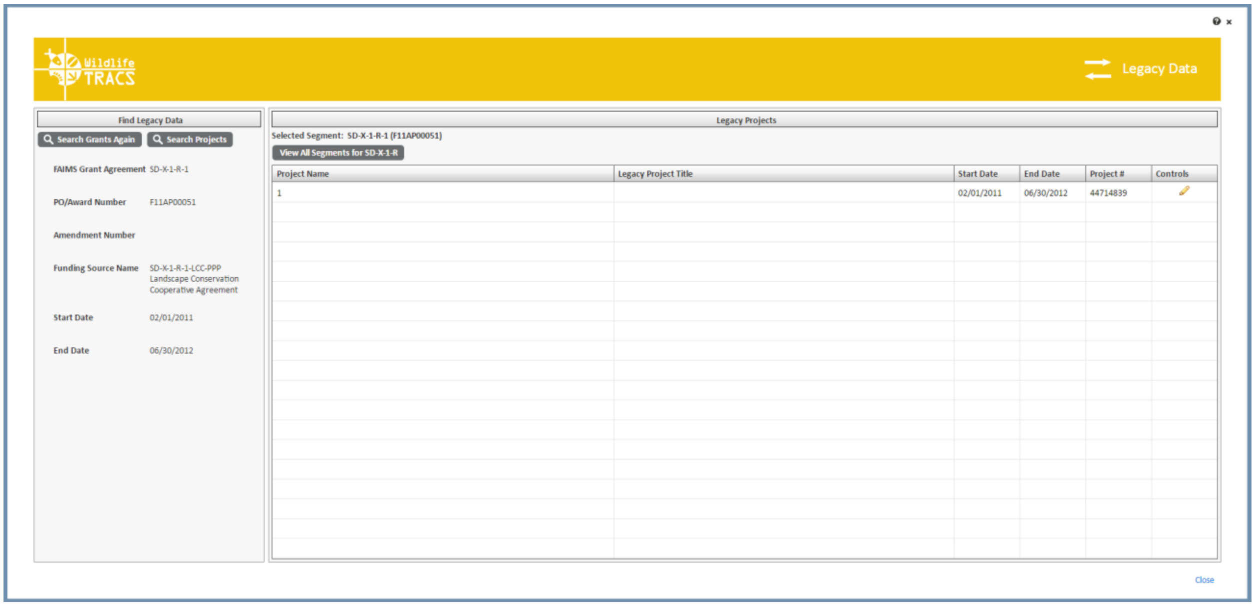
Click on a listed funding source to highlight, then click **Select**.



Edit Project Properties

Select the pencil icon located in the **Controls** column to edit the project properties.

On the left side panel, the conversion details will display including the FAIMS Grant Agreement, PO/Award Number, Funding Source Name, Start Date and End Date.



<u>*Conversion Details:*</u>

- *FAIMS Grant Agreement > Self Explanatory Po/Award Award > Self Explanatory Funding Source Name > Self Explanatory*
- *Start Date and End Date > FAIMS E/E Grant Agreement and Amendments Start and End Date Name > E/E Project Information > Project ID (or if no FAIMS Project existed, E/E Accomplishment Information >Accomplishment tag).*
- *Start Date and End Date > E/E Project Information or E/E Accomplishment Information > Oldest and Newest Project Dates that share the same FAIMS primary key identifier > Cumulative of all projects entered in FAIMS for a specific project id and name. Projects with the same name but different Primary Key are not included. Refer to Related Projects for a list of projects with the same project name with a different Primary Key. This distinction was not visible through the FAIMS Application.*

Project Data

Select a project (i.e., Project 50125691-1).

- Note: The duplicate warning screen is displayed if there were multiple project records in FAIMS with a non-unique Project ID and Name. In this case, the legacy project serves as a placeholder for multiple grant segments. The project with the most recent open grant segment will appear in the Active list.

Wildlife TRACS

Guided Process Tool

This legacy project is associated with multiple legacy grant segments. Click the "Active Segments" or "Other Segments" headers below to expand the list of available grant segments under each section.

Legacy Grant Nos. displayed in the "Active Segments" list are linked to projects which share a FAIMS Project ID (E/E Project Information) or Tag (E/E Accomplishment), and which were identified as fiscally "Active" during the conversion process. Legacy projects may have an "Active" status for a number of reasons, including ommission of an "Annual Performance Report Certified Checklist Event" in FAIMS or the legacy grant segment is less than 3 years old and performance data entry is

Active Segments

Project 360428 - 1

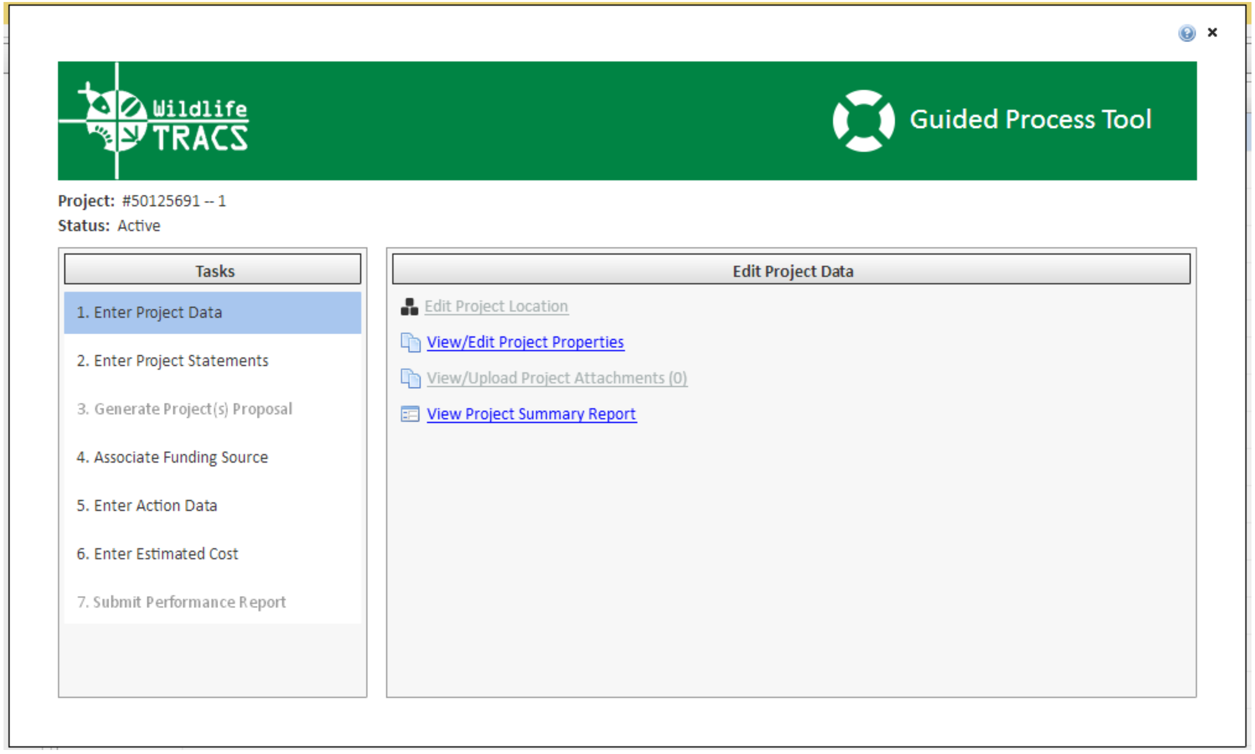
Project 362891 - 1

Project 50125691 - 1

Other Segments

Completing a Legacy Project

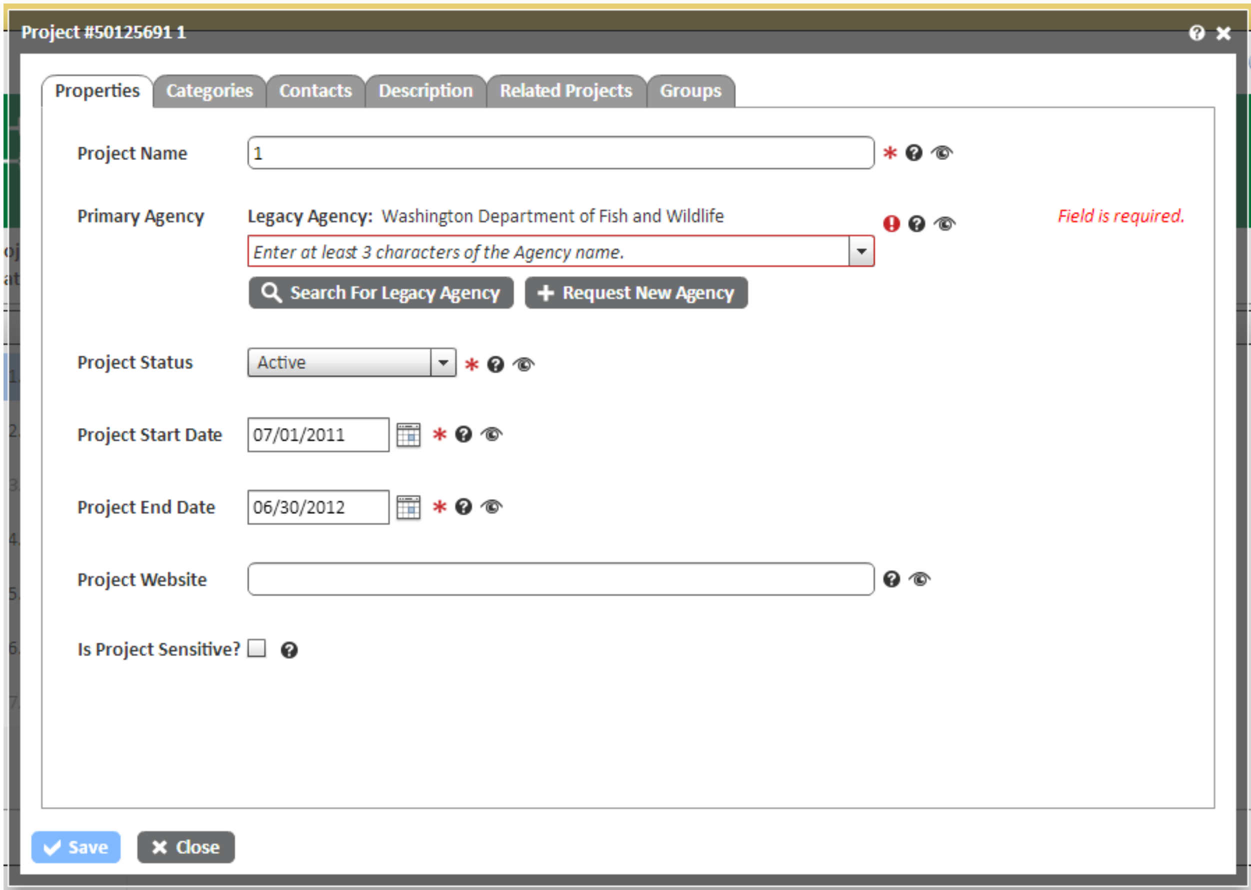
Select **View/Edit Project Properties** in the right panel.



Properties Tab

Verify the **Legacy Agency** exists by entering 3 characters from the agency name, then select it from the list.

To enter accomplishment information for grants with a project or accomplishment history in FAIMS, users are required to populate the Primary Agency and change the Project Status to “Active”. If the Primary Agency is not listed in the lookup, use the Create New Agency button to submit a request with the Agency name.

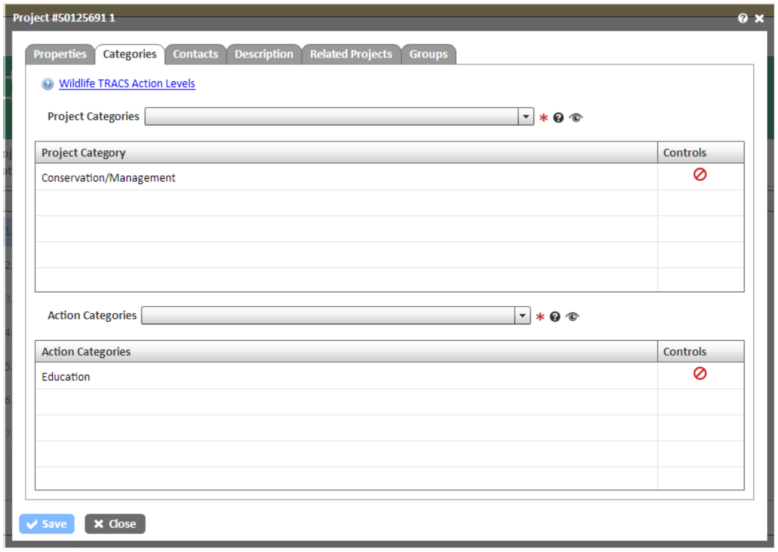


<u>Conversion Details:</u>

- *Project Name > E/E Project Information>Project ID or E/E Accomplishment Information > Accomplishment Tag*
- *Land > Project Name > Land Tract Name Primary Agency > Self Explanatory*
- *Project Status > E/E Grant Agreement "Open" or "Closed"*
- *Project Start and End Date > E/E Project Information > or E/E Accomplishment Information*
- *Oldest and Newest Project Dates > Cumulative of all projects entered in FAIMS for a specific project key identifier and name.*
- *Project Website - Blank*

Categories Tab

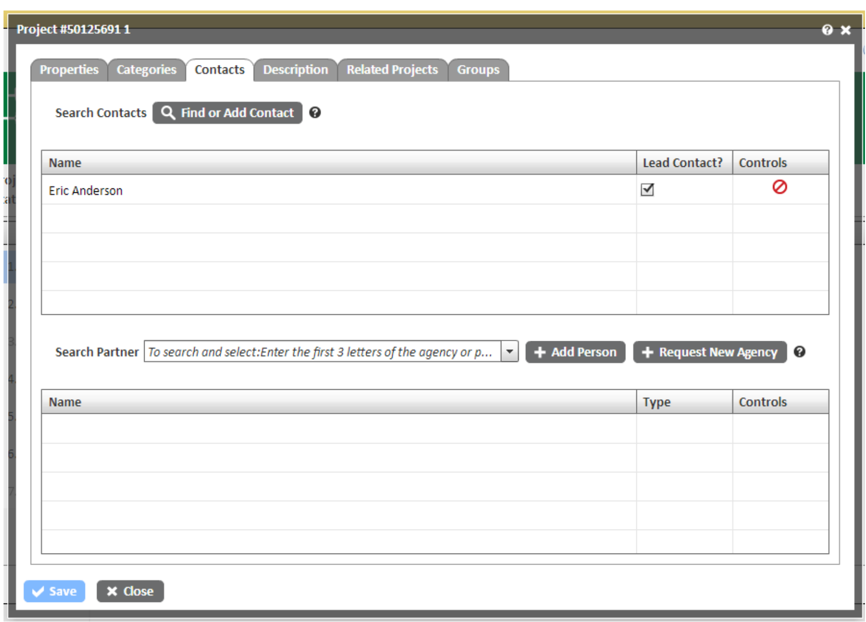
Tab should be populated by legacy conversion; if not, see below:



- Select the **Wildlife TRACS Actions Level** link located in the upper right to view the new TRACS actions mapped back to the old FAIMS Activity codes.

- From FAIMS: Column 1 maps to Project Categories, Column 2 maps to Action Category, Column 3 maps to Action Strategy and Column 4 maps to Action Activity.

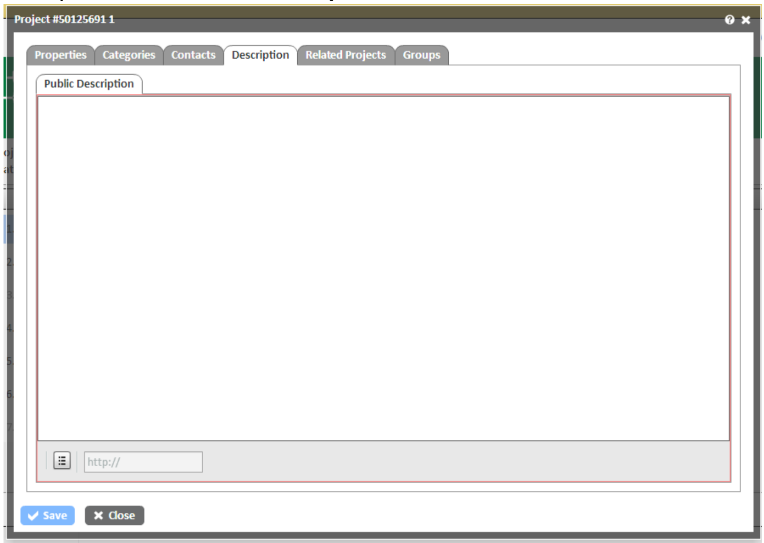
Contacts Tab



<u>Conversion Details:</u>
Contacts > Self Explanatory

Description Tab

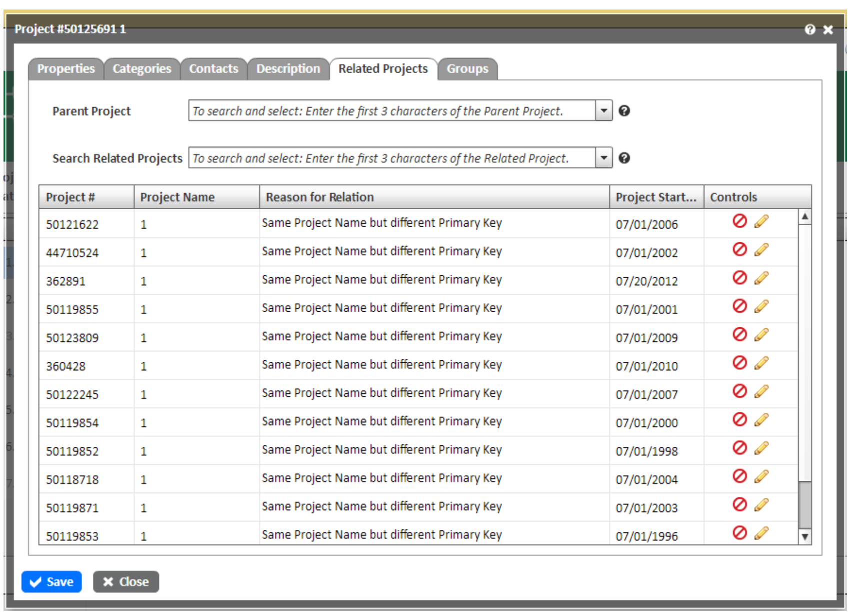
Complete the **Public Description** field



Conversion Details:

Public Description > E/E Grant Agreement > Objectives/Benefits and Notes including Amendments. All projects that share the same FAIMS primary key identifier are included. Land > Public Description > E/E AFA Land Information or E/E GA Land Information> Objectives and Benefits

Related Projects



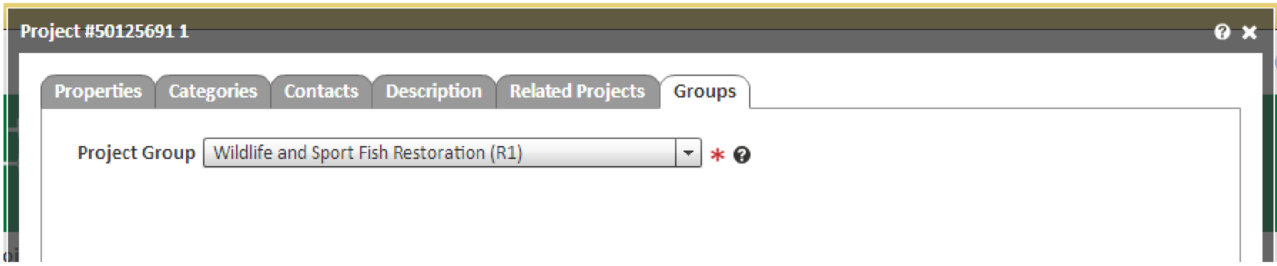
Project #	Project Name	Reason for Relation	Project Start...	Controls
50121622	1	Same Project Name but different Primary Key	07/01/2006	
44710524	1	Same Project Name but different Primary Key	07/01/2002	
362891	1	Same Project Name but different Primary Key	07/20/2012	
50119855	1	Same Project Name but different Primary Key	07/01/2001	
50123809	1	Same Project Name but different Primary Key	07/01/2009	
360428	1	Same Project Name but different Primary Key	07/01/2010	
50122245	1	Same Project Name but different Primary Key	07/01/2007	
50119854	1	Same Project Name but different Primary Key	07/01/2000	
50119852	1	Same Project Name but different Primary Key	07/01/1998	
50118718	1	Same Project Name but different Primary Key	07/01/2004	
50119871	1	Same Project Name but different Primary Key	07/01/2003	
50119853	1	Same Project Name but different Primary Key	07/01/1996	

Conversion Details:

Related Projects > E/E Project Information > Projects that share the same project name but with a different primary key or E/E Accomplishment Information > Accomplishments that share the same project name but with a different primary key.

Groups

The project group will be listed as the regional WSFR group that owns the project.

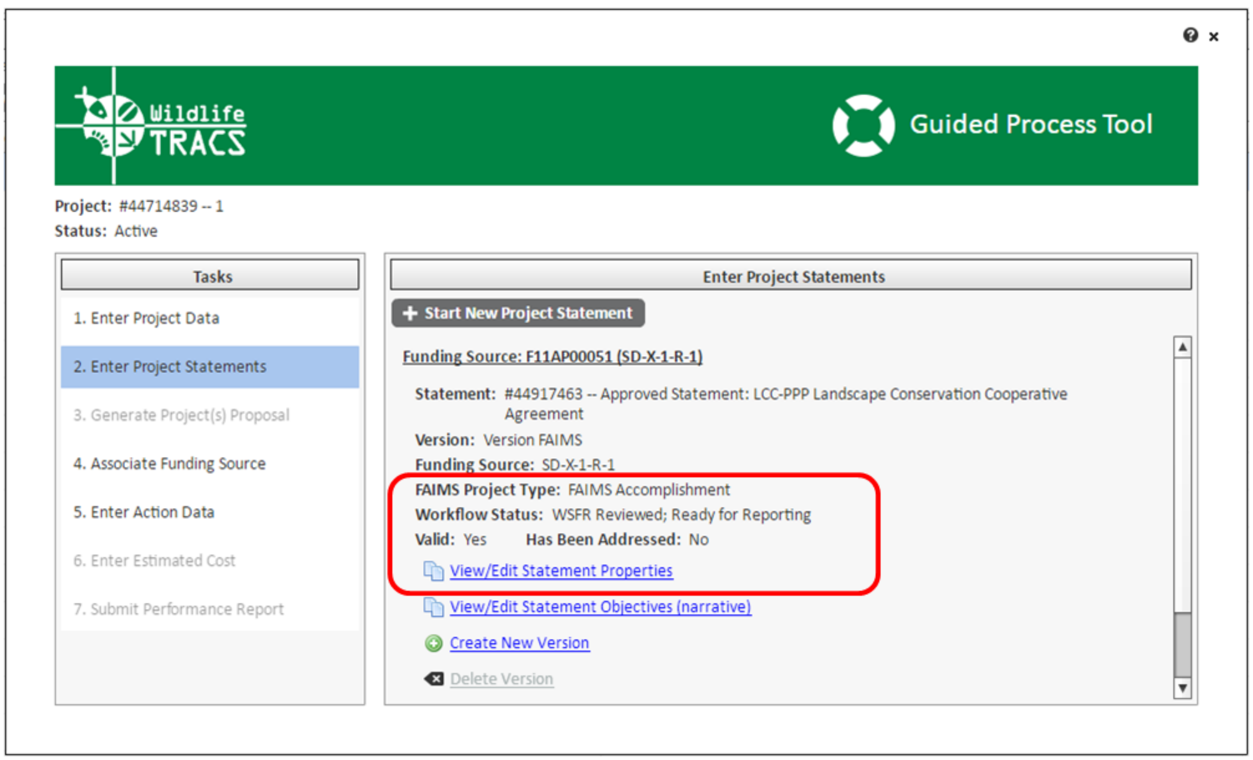


Project Statement

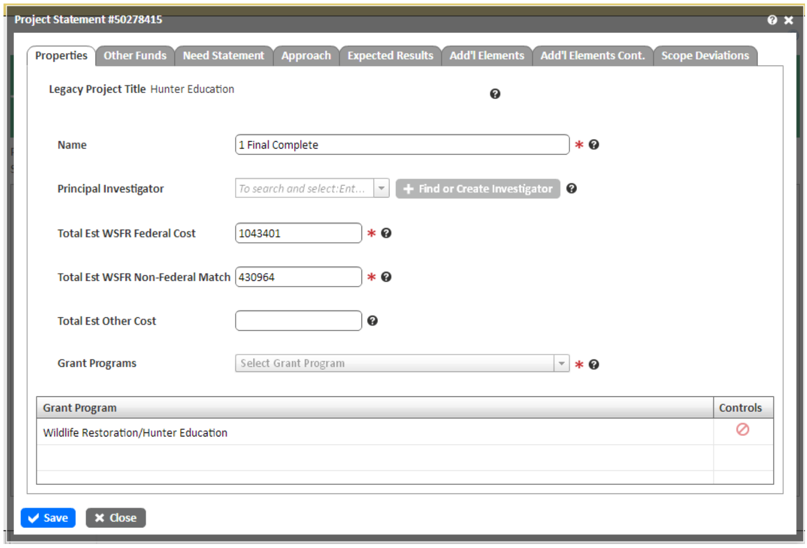
Navigate to **2. Enter Project Statements** in the Tasks Panel.
Select the **View/Edit Statement Properties** link in the right pane for each statement.

- Note: There will be multiple Project Statements for each FAIMS accomplishment (FAIMS Project type will display as “FAIMS Accomplishment”).

When viewing the Project Statements, if the Project Statement field “Has Been Addressed” is "Yes", then no action is required.



Project Statement Properties Tab

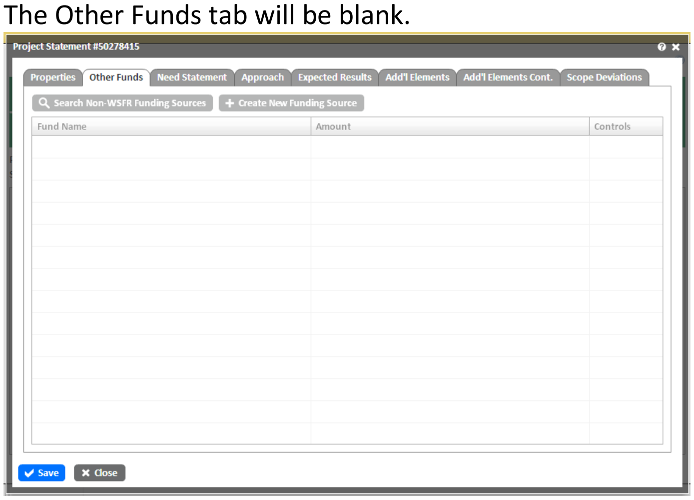


Conversion Details:

- *Name > E/E Project Information > Project Name or E/E Accomplishment Information > Accomplishment Tag*
- *Land > Name > E/E AFA Land Information or E/E GA Land Information > Title Principal Investigator > Will be blank because the information did not exist in FAIMS.*
- *Total Est WSFR Cost and Non WSFR Cost > E/E Accomplishment > Values based on the total cost of associated Actions. Or E/E Project Information if FAIMS Project existed but no Accomplishments were entered > Value - $0*
- *Grant Program > E/E Project Information > Grant Programs for the Project's Activities or E/E Accomplishment Information > Grant Programs for the Accomplishment's Activities.*

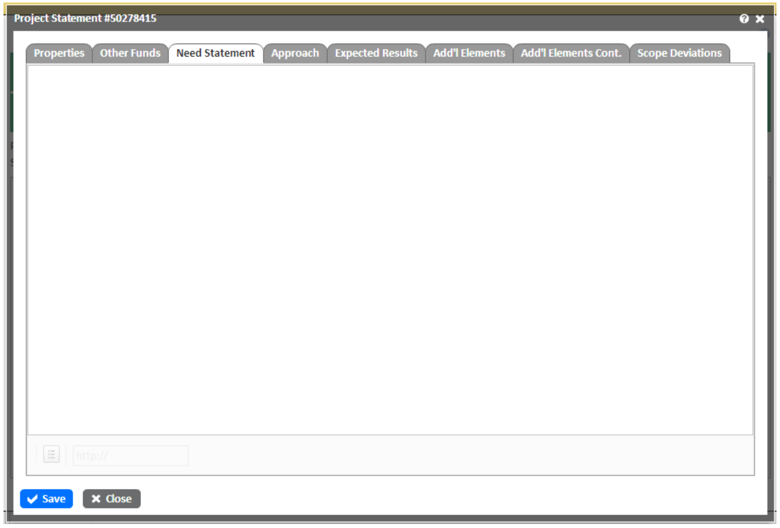
Other Funds Tab

The Other Funds tab will be blank.



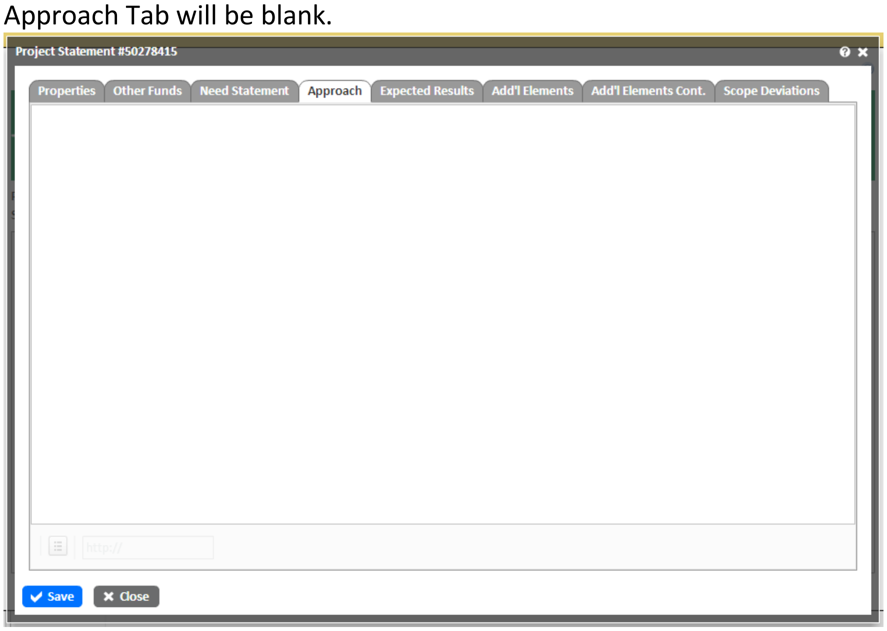
Need Statement Tab

Need Statement Tab will be blank.



Approach Tab

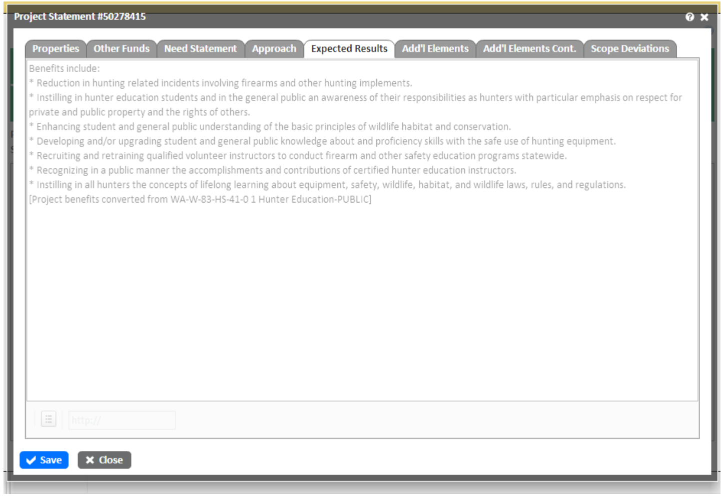
Approach Tab will be blank.



Expected Results Tab

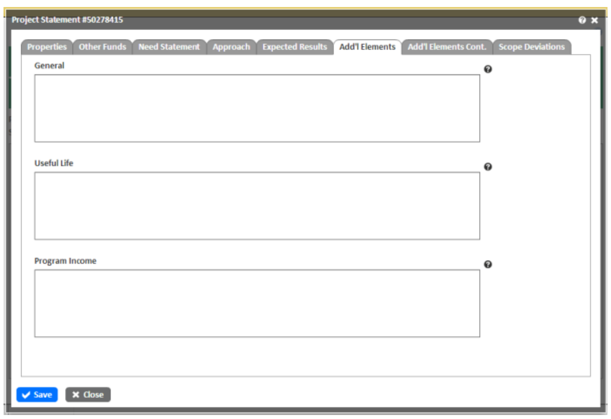
If no FAIMS Project(s) exist, then E/E Grant Agreement > Objective/Benefits are used.

<u>Conversion Details:</u>
Expected Results > E/E Project Information > Benefits



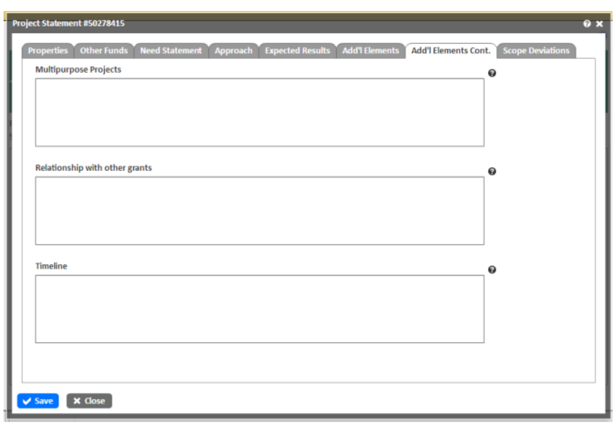
Add'l Elements Tab

Add'l Elements Tab will be blank.



Add'l Elements Cont. Tab

Add'l Elements Cont. Tab will be blank.

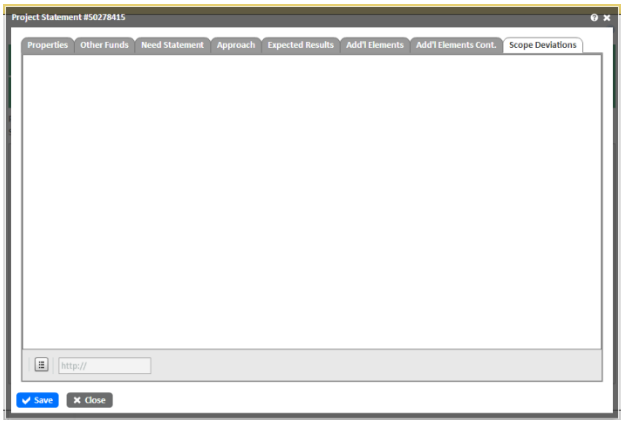


Scope Deviations

May contain information from conversion, otherwise will be blank.

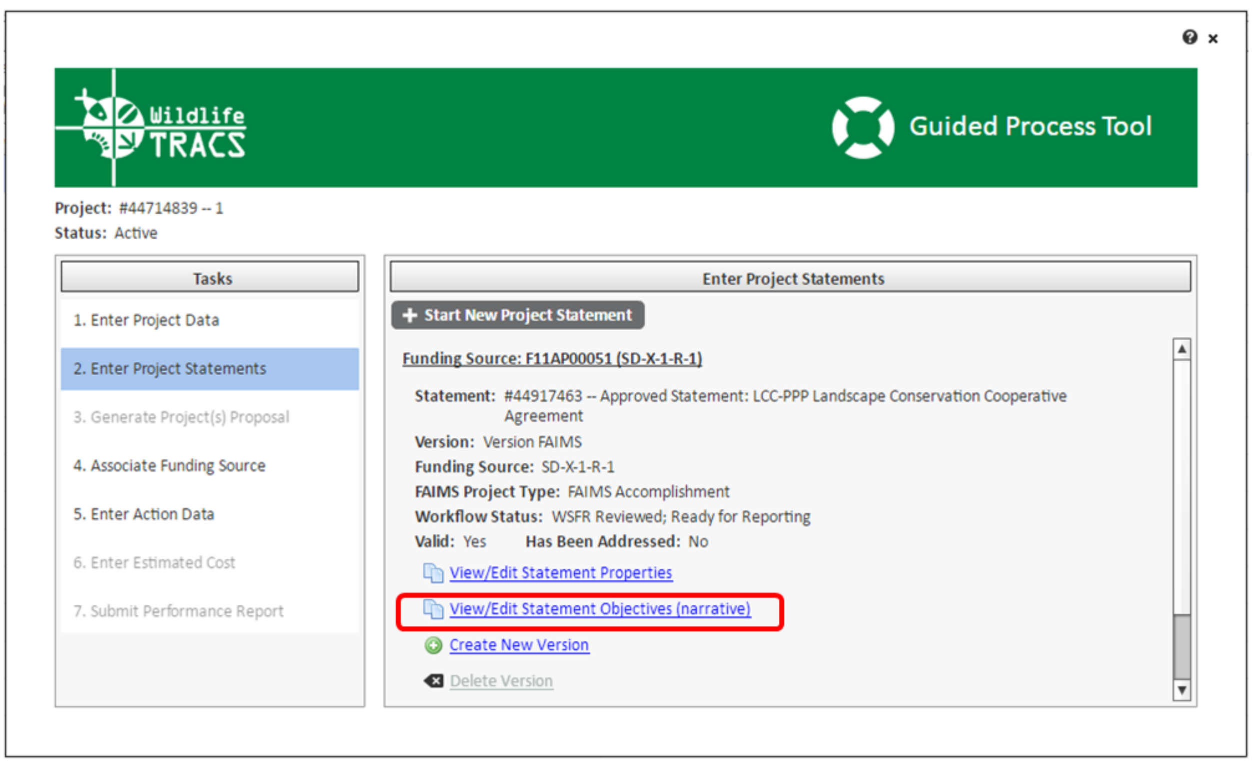
<u>*Conversion Details:*</u>

- *Scope Deviations > E/E Grant Agreement > Conditions and Purpose*
- *Land > Scope Deviations>E/E AFA Land Information or E/E GA Land Information > Conditions and Purpose*



Statement Objectives

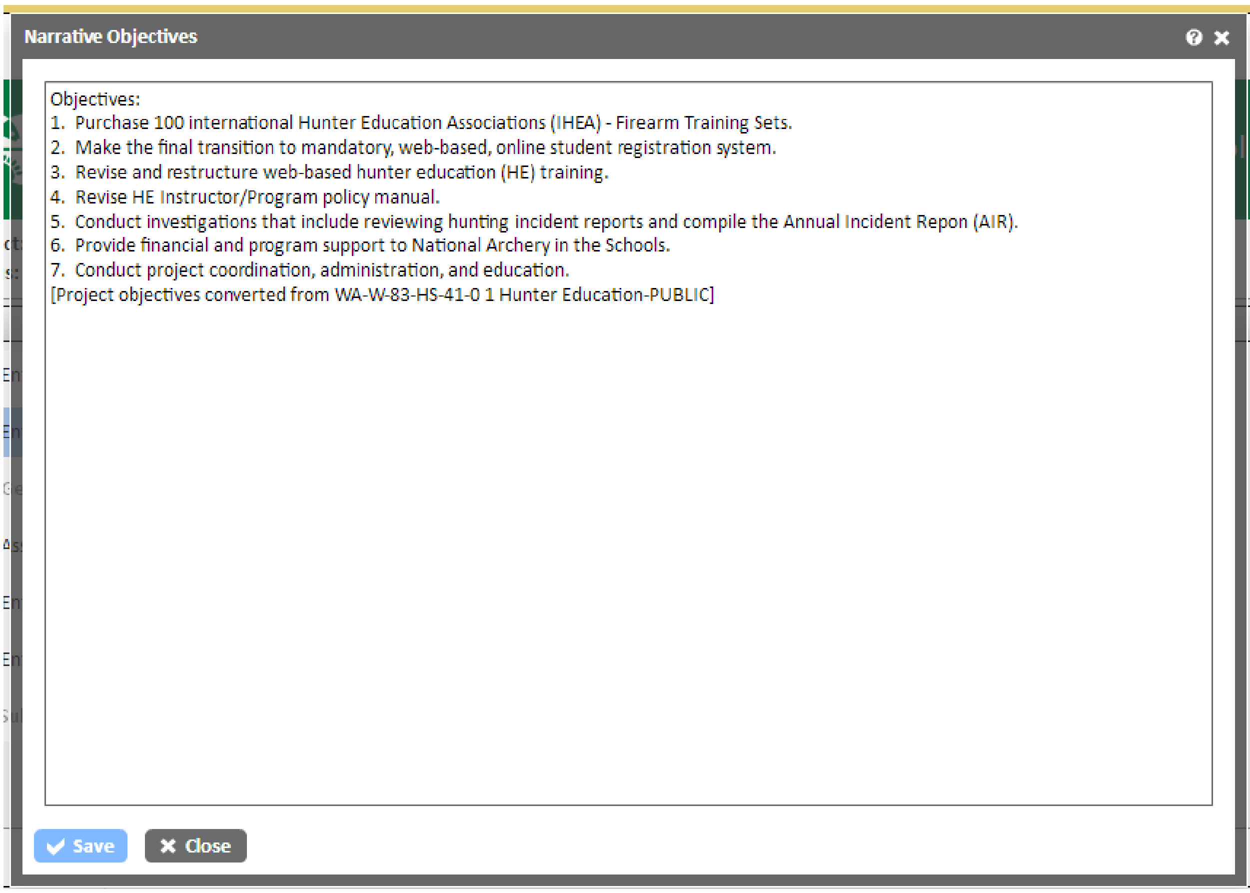
Select the **View/Edit Statement Objectives (narrative)** link in the right panel



Statement Objectives

<u>*Conversion Details:*</u>

- *Statement Objectives > E/E Project Information > Project Objectives*
- *Land > Statement Obectives > E/E AFA Land Information or E/E GA Land Information > Objectives and Benefits*

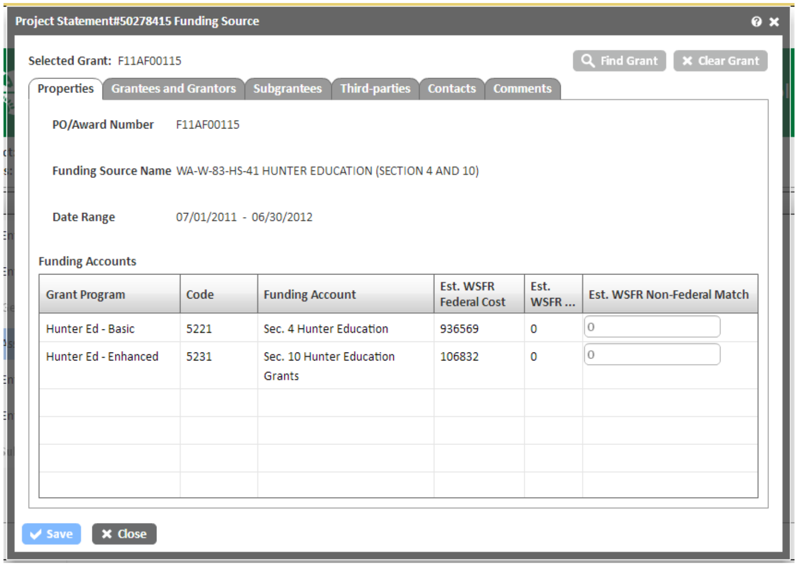


Associate Funding Source

Click **4. Associate Funding Source** in the Tasks Panel
Select the appropriate **View/Edit Funding Source** link in the right panel

Funding Source Properties Tab

Note: The Est. WSFR Non-Federal Match has dollar amounts.

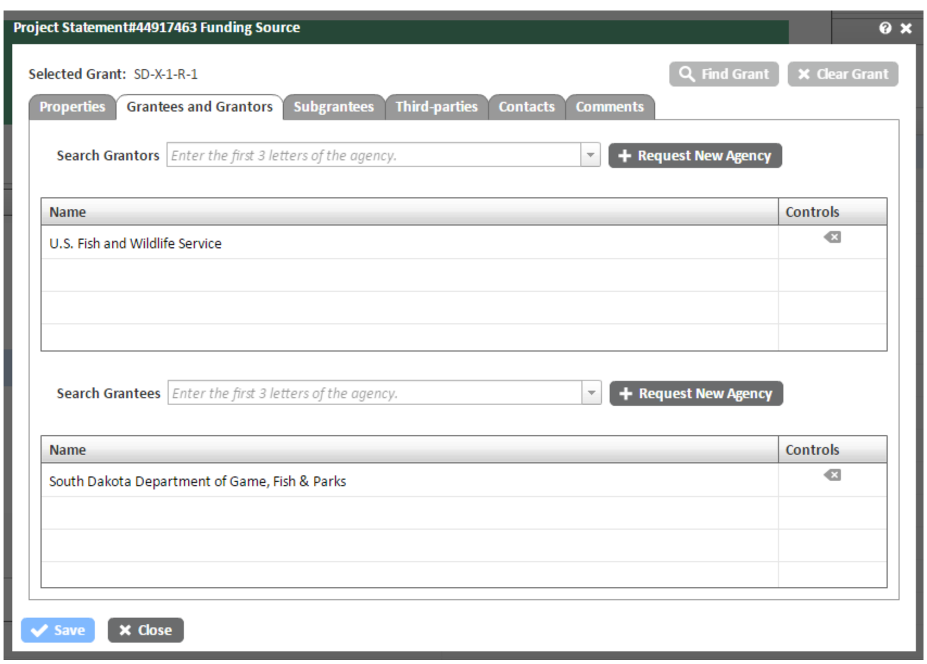


Conversion Details:

- *P/O Award Number > Self Explantory Funding Source Name > Self Explantory*
- *Date Range > E/E Grant Agreement > Start and End Date Grant Program > E/E Grant Agreement > Cost*

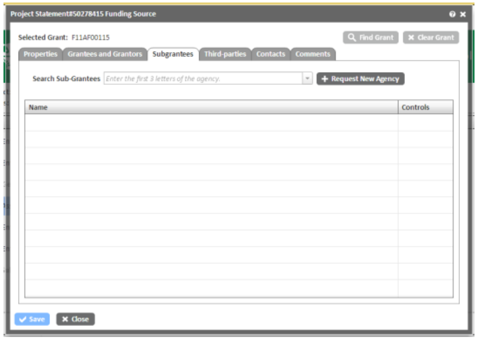
Grantees and Grantors Tab

Conversion Details:
Grantees and Grantors > Self -Explanatory



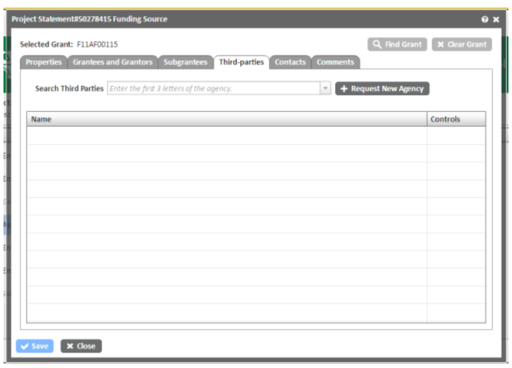
Subgrantees Tab

Subgrantees Tab will be blank.

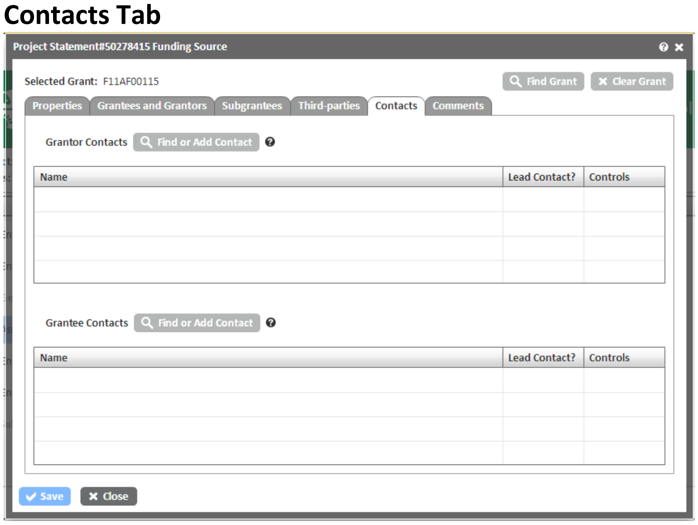


Third-parties Tab

Third-parties Tab will be blank.

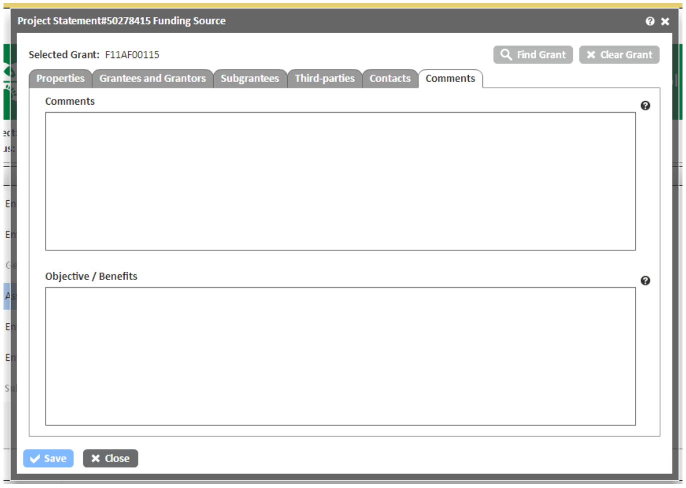


Contacts Tab



<u>Conversion Details:</u>
Contacts > Self Explanatory.

Comments Tab



Action Data

Click **5. Enter Action Data** in the **Tasks Panel**

If an action exists, select **View/Edit Action Properties** from the right panel Properties Tab. If no actions exist, enter them using the **Create New Action** button.

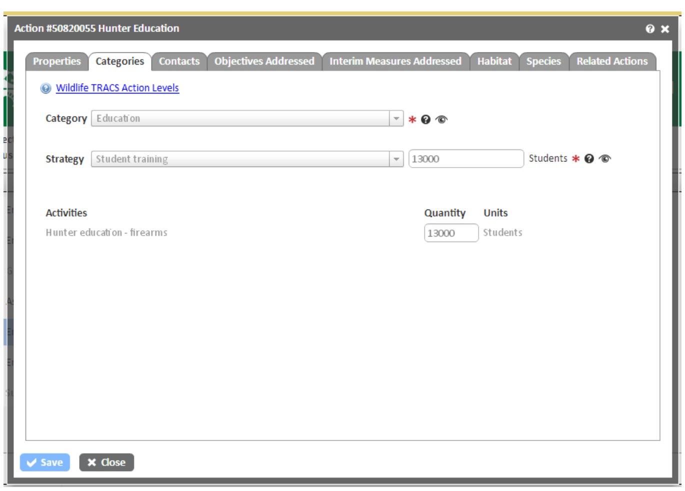
Conversion Details:

- *Action Name > E/E Accomplishments >Activity Code Land - Action Name > Tract Name*
- *Action Status > E/E Grant Agreement*
- *Action Start and End Date > E/E Grant Agreement and E/E Grant Amendment(s). Uses Effective Date as Start Date and if null uses the Start Date.*
- *Reporting Fiscal Year > Display only. Populated from Action Start and End Date.*

Categories Tab

Conversion Details:

Category and Strategy > E/E Accomplishments > Activity Code



Contacts Tab

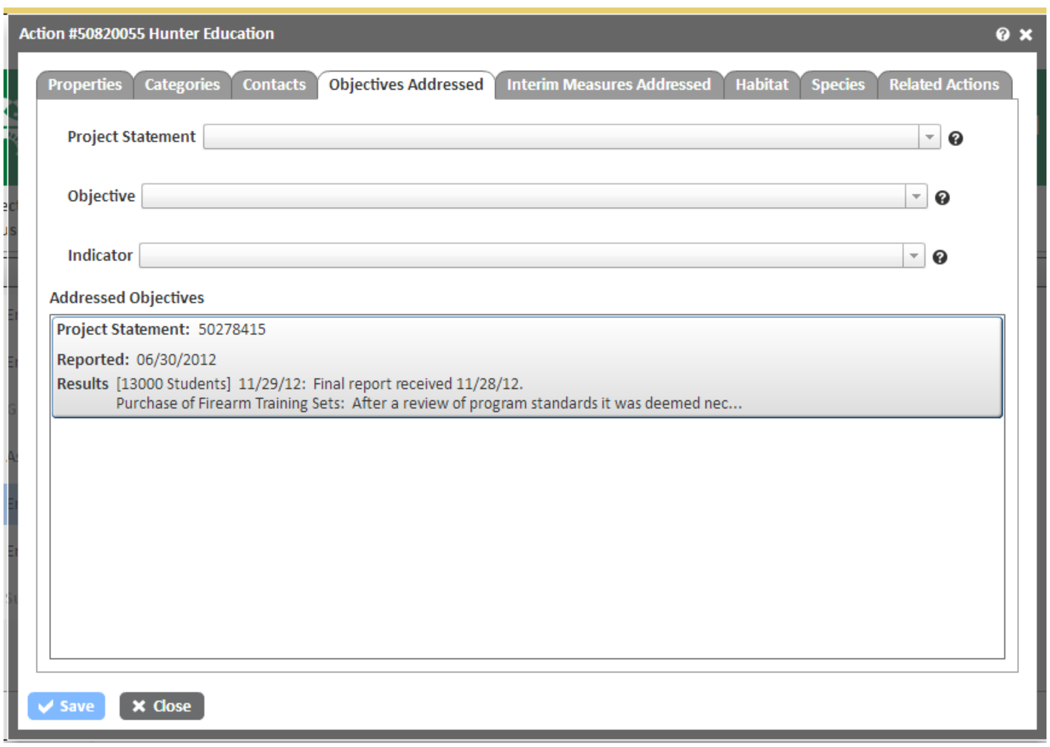
Conversion Details: Contacts > Self Explanatory

Objectives Addressed Tab

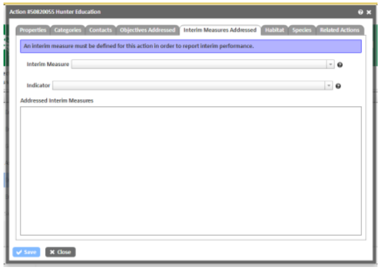
Note: Highlight the **Project Statement** to View/Edit.

Conversion Details:
Addressed Objectives > E/E Accomplishments > Project Results and Segment Results and Activity Notes and E/E Project Information > Project Results

Interim Measures Addressed Tab

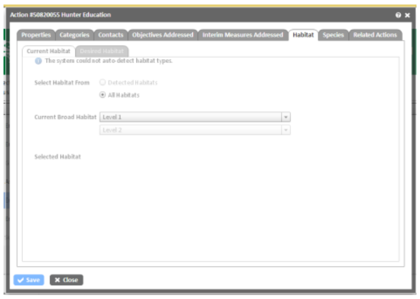


Interim Measures Addressed Tab will be blank.



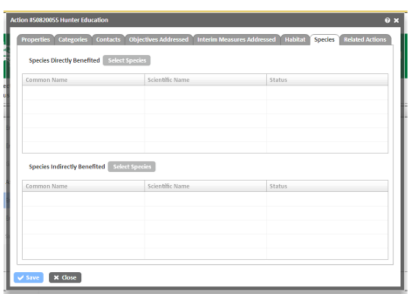
Habitat Tab

Habitat Tab will be blank. This will be populated in the near future.



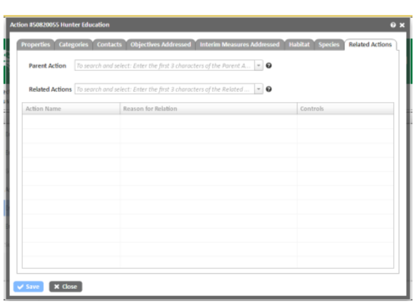
Species Tab

Species Tab will be blank. This will be populated in the near future.



Related Actions Tab

Related Actions Tab will be blank.



Estimated Cost

Click on **6. Enter Estimated Cost** in the Tasks Panel.
Select **View/Edit Project Estimated Cost** in the right panel.

Conversion Details:

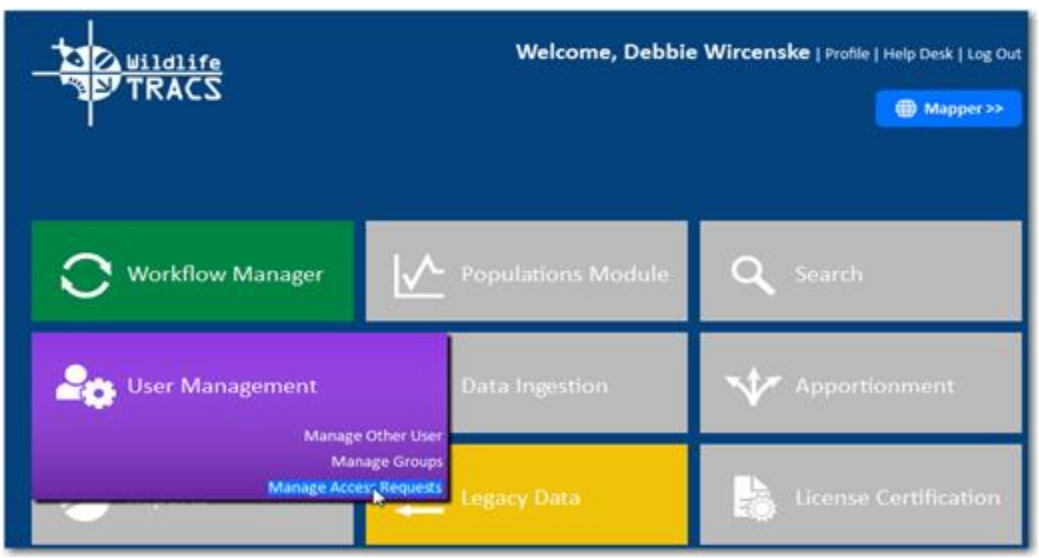
- *Note: conversion details may have changed.*
- *Cost (left side) > E/E Grant Agreement Costs (Should read Action Cost>E/E Accomplishments>This should aso include amendment(s), if any*
- *If no Accomplishment Records>E/E Grant Agreement*

User Administration

The User Administrator is the only role in TRACS with permission to approve new user registrations. Each state and WSFR region has an assigned User Administrator that has been appointed by their director or agency/division head. For more information on the appointment process or if you have questions about the status of your registration request, please contact your User Administrator or the tracs-helpdesk@fws.gov.

1. Log into the TRACS live site: https://tracs.fws.gov/data_tracs/dt/dashboard. Enter your username and password and click the Agree and Log In button.

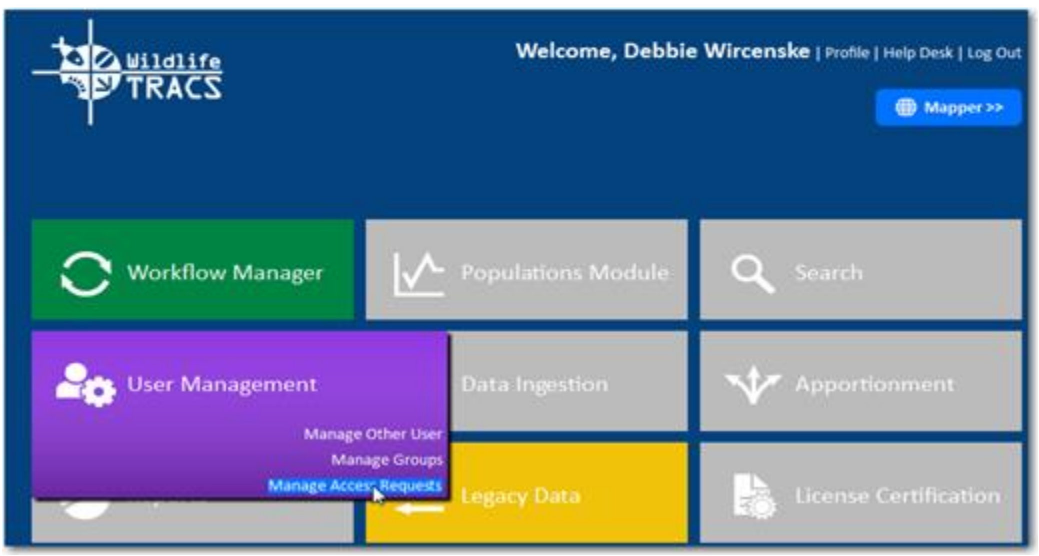
2. From the TRACS Dashboard, click on **User Management** to view a nested sub-menu to the right (this module is only accessible to User Administrators). The User Management Module contains three links:
   - **Manage Other Users:** edit other users profiles and permissions
   - **Manage Groups:** create, edit or delete groups and sub-groups
   - **Manage Access Requests:** displays a list of users who need to have their access requests approved



Manage Access Requests

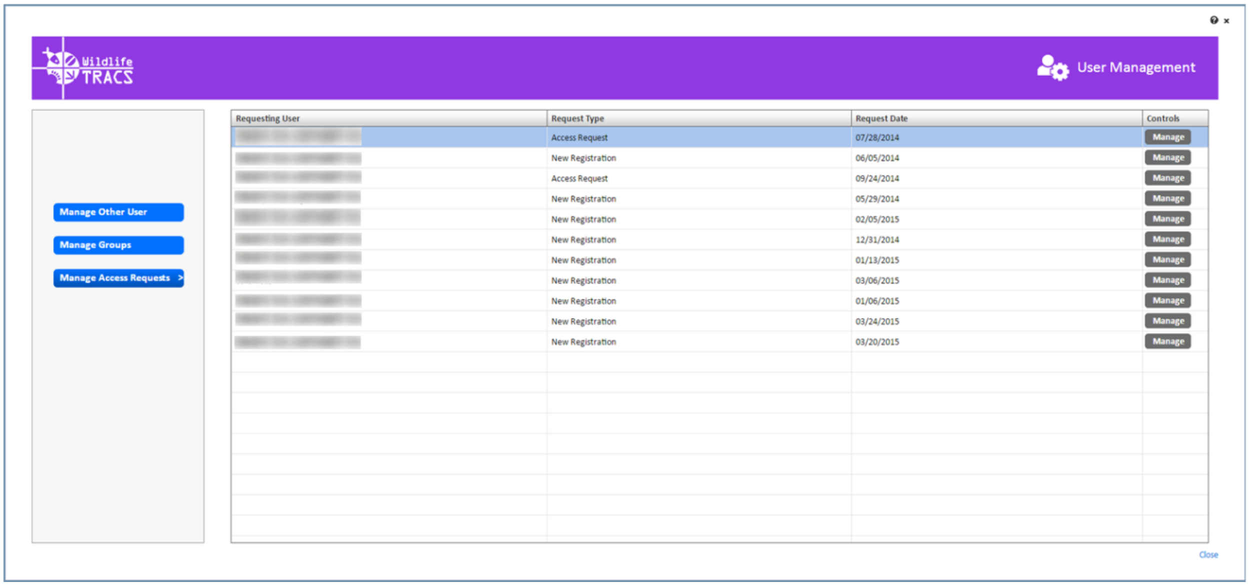
When a new user registers for access to the live TRACS environment, their User Administrator for their agency/division/region will receive an automated email from TRACS with the subject "**New TRACS Registration Request Waiting for Your Approval**". All users with access to TRACS can edit their own profiles and submit requests for additional access for themselves. These requests are also sent to the User Administrator via an automated email from TRACS with the subject "**New TRACS Access Request Waiting for Your Approval**". As the user administrator, you will need to log in to TRACS to review and approve access requests within your assigned agency/division/region.

From the TRACS Dashboard, click on **User Management** to view a nested sub-menu to the right (this module is only accessible to User Administrators). Select **Manage Access Requests** to displays a list of users who need to have their access requests approved

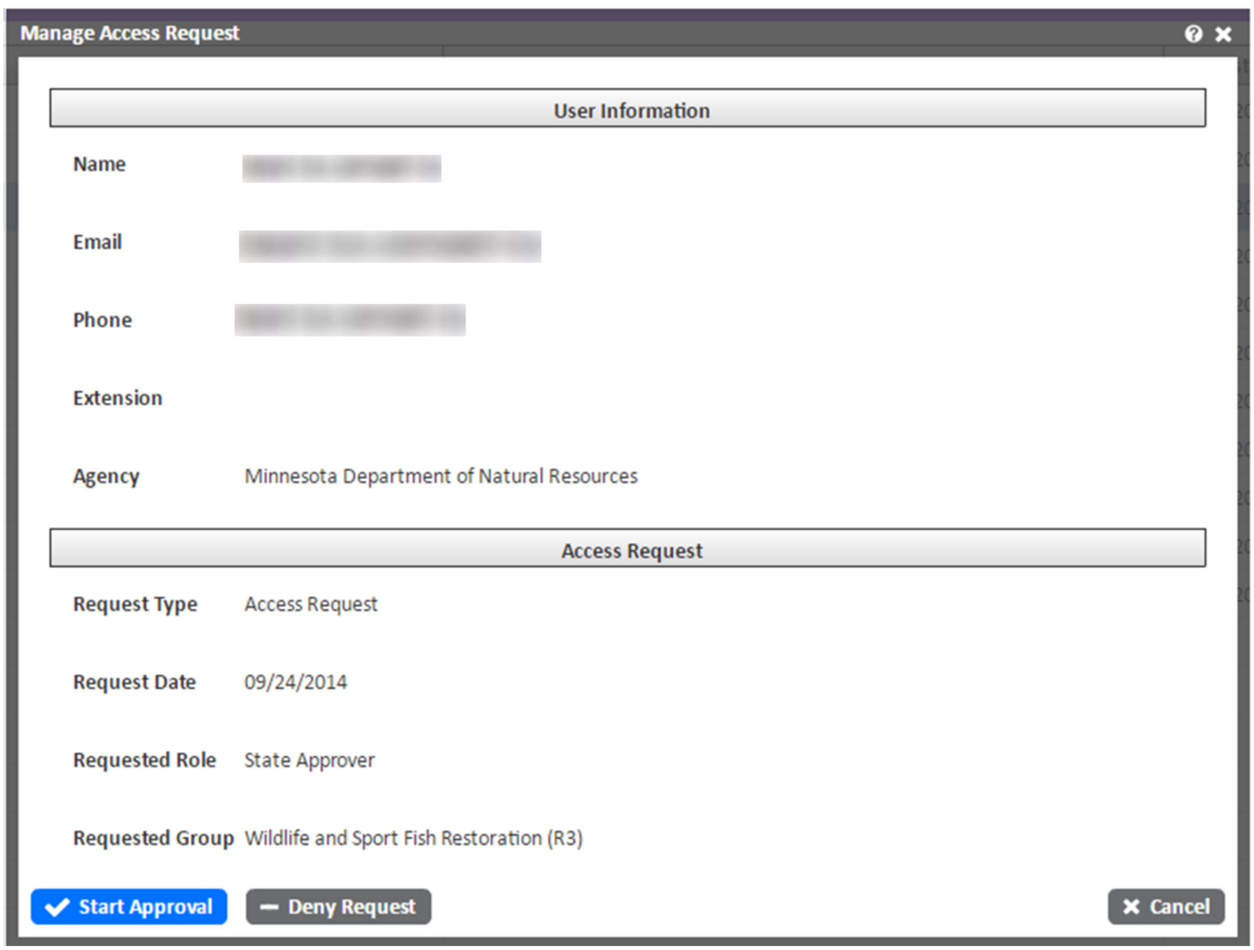


Select **Manage Access Requests** to open the User Management window. A list of requesting users displays for the administrators identified for their division/agency/region. The request type will display as either **New Registration or Access Request**.

For each one, click on the **Manage** button located on the right side under the **Controls** column.

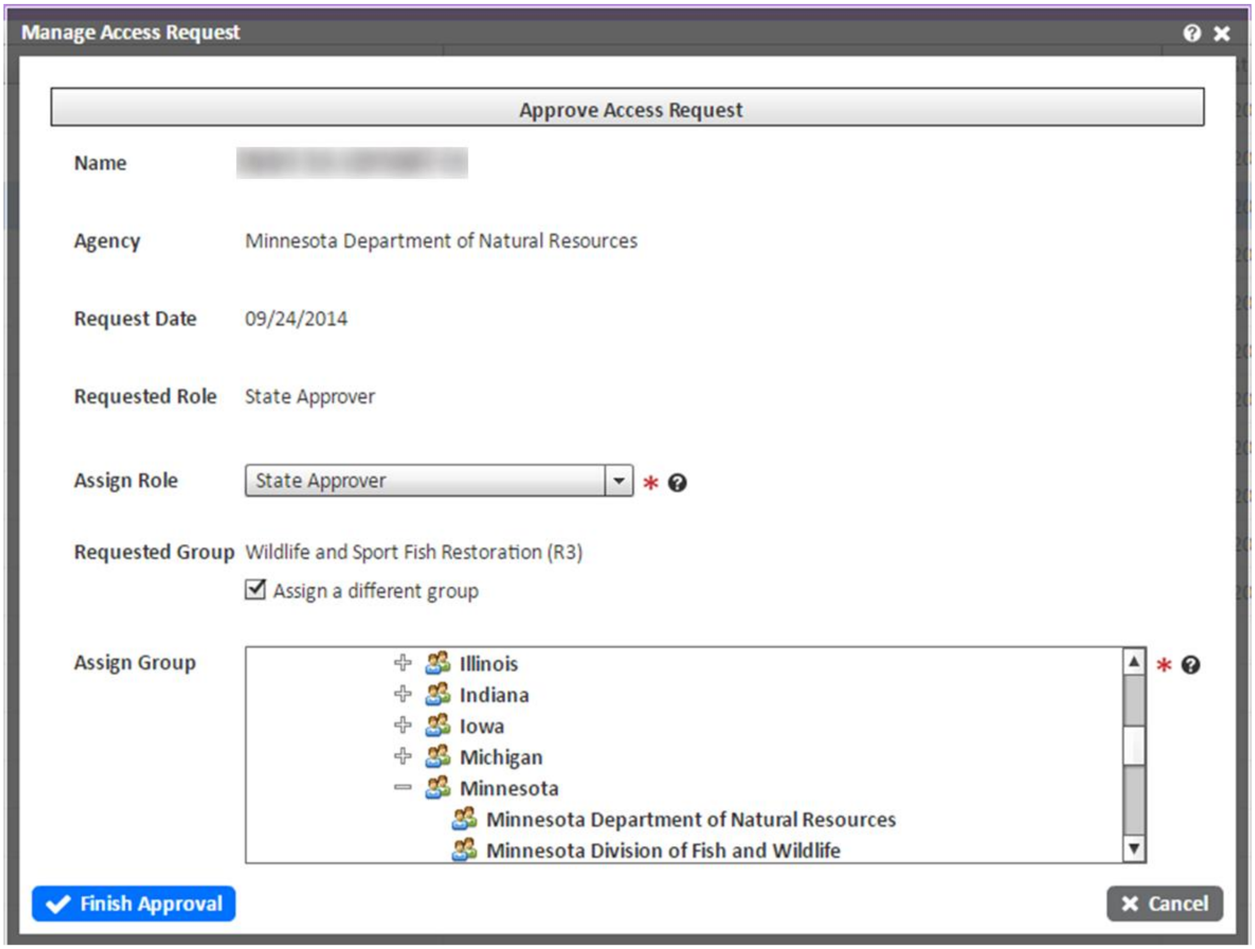


The Manage Access Request form opens and contains the user profile information and access level requested by the user. Click the **Start Approval** button on the bottom left of the form.



On the Approve Access Request form, verify that the user's **Requested Role** and **Requested Group** are correct. Typically the agency listed for the user should match the requested group.

- <u>If the Requested Role is incorrect:</u> select the correct role from the **Assign Role** drop down menu.
- <u>If the Requested Group is incorrect:</u> check the box to **Assign a different group**. Then select the correct group from the **Assign Group** box by clicking on the plus sign (+) to expand the agency lists below TRACS.
- Note: The User Role will default based on the Agency Type. The default role for users associated with a federal agency is Federal Reviewer. The default role for users associated with a state or tribal agency is State Editor.



Once the request has been reviewed (and corrected if needed), click the **Finish Approval** button and click **Ok**. The requesting user will receive a system notification email with the subject “TRACS Registration Request Approved”.

Role and Group Assignment

Each user is assigned to a user group (agency/division/region) and user role (permissions within their assigned groups). The **Approve Access Request** form allows a User Administrator to assign or change role(s) and groups for a user request.

The **Requested Role** is the default role assigned to user request. The default role is identified from the **Agency Type** selected by the user when registering for access to TRACS. The default role for users associated with a federal agency is **Federal Reviewer**. The default role for users associated with a state or tribal agency is **State Editor**.

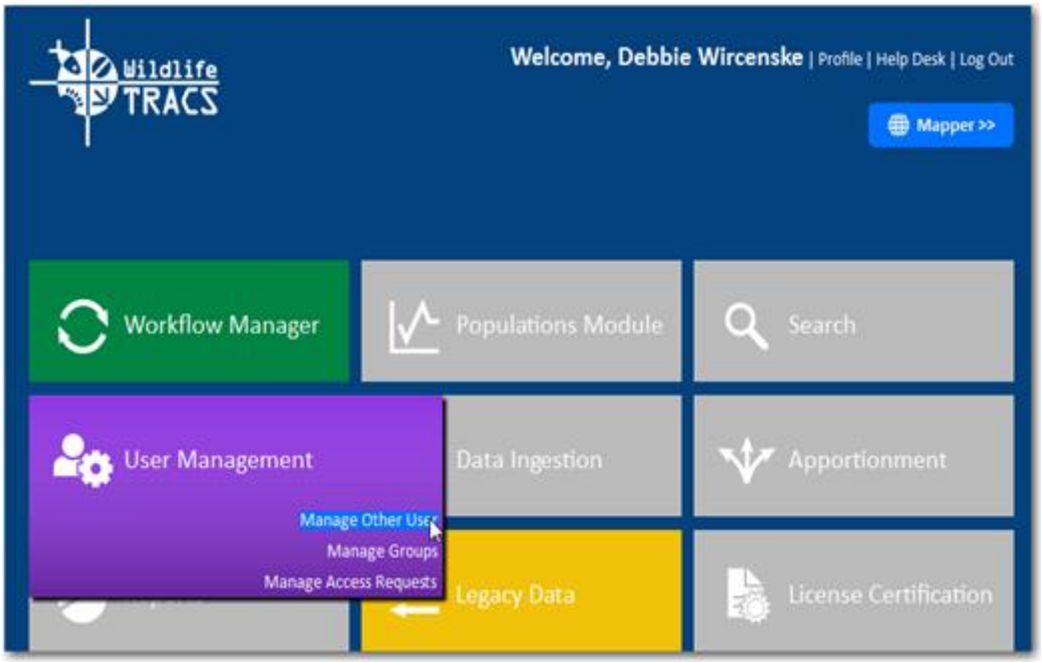
- The **Editor** role allows an end user to create and edit plans, projects, and actions within their assigned group and initiate workflow actions.
- The **Reviewer** role enables an end user to create and edit plans, projects and actions within their assigned group and complete review functions in the workflow.
- The **Approver** role allows an end user to create and edit plans, projects and actions within their assigned group and complete approval functions in the workflow.

Project proposals and performance reports go through an approval workflow in TRACS. The approval workflow sends the project through **state peer review, state approval, WSFR review and WSFR approval**. The user administrator is responsible for assigning users to the correct role to complete their assigned tasks. TRACS permissions are hierarchical with each level above having the same access as the role below.

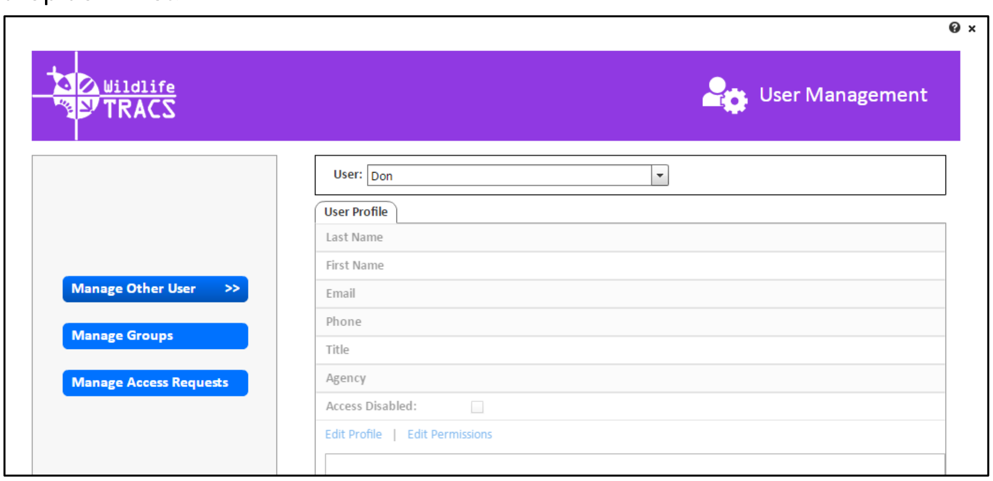
Manage Other Users (Edit User Profile & Permissions)

User Administrators are responsible for managing other user accounts within their assigned agency/division/region. The user administrator has access to edit user profiles and permission levels. (Note: Users can edit their own profile information and request additional access from the Profile tool).

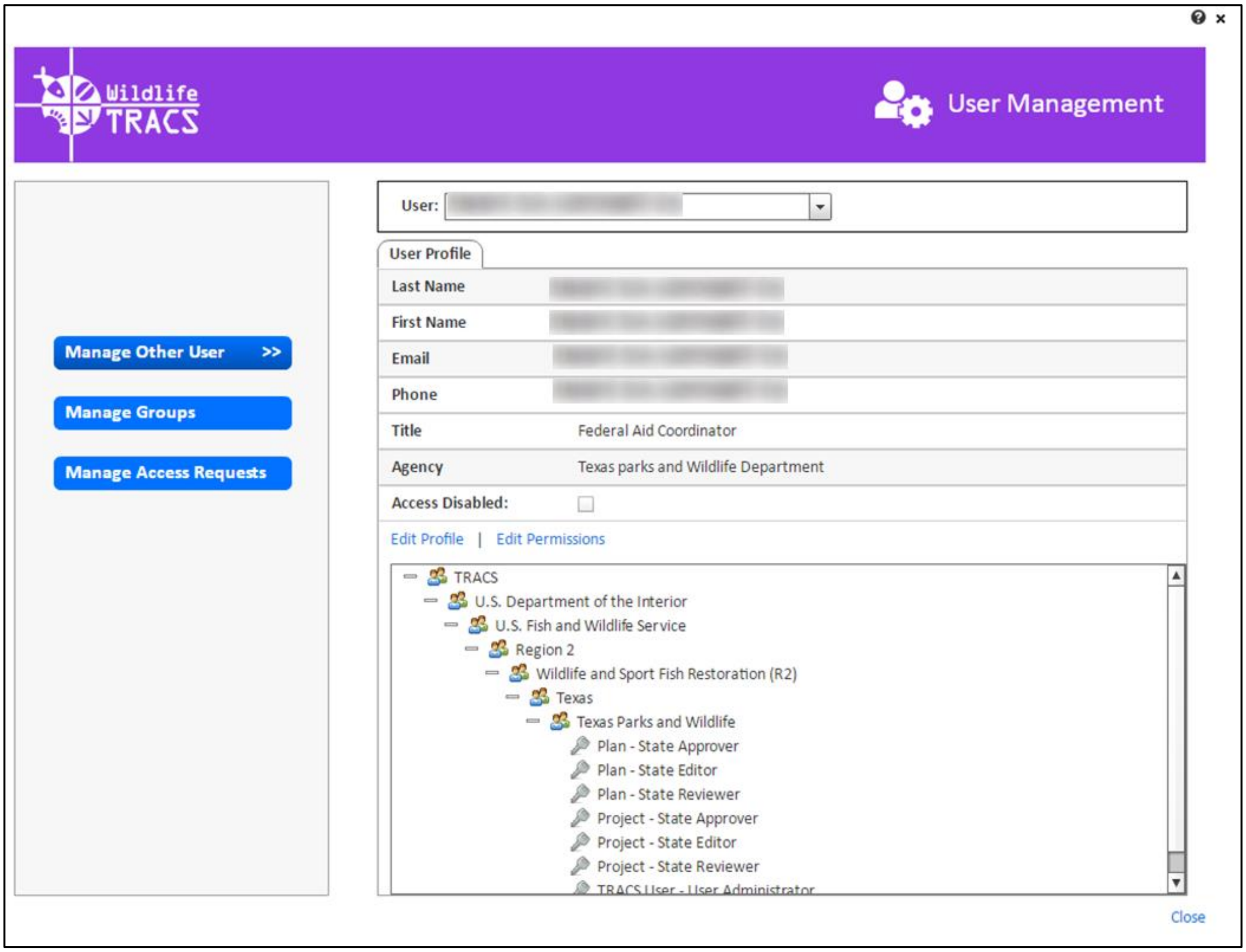
1. Select **Manage Other Users** from the **User Management** module.



2. Type the first three letters of the requesting user's first or last name. Select the user from the drop down list.

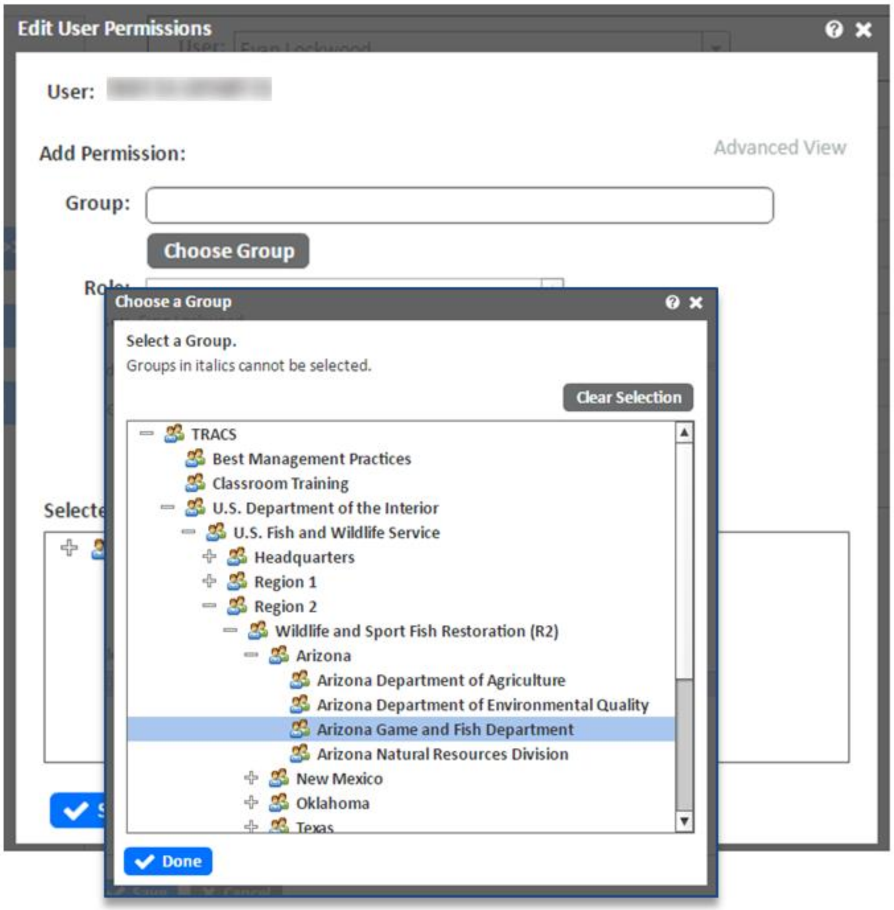


3. The user's profile will display. To view the user's permissions, click on the plus sign (+) next to TRACS and next to each sub-menu (agencies are nested in TRACS to show the hierarchy). Agencies display with the people icon and permissions display with the key icon.

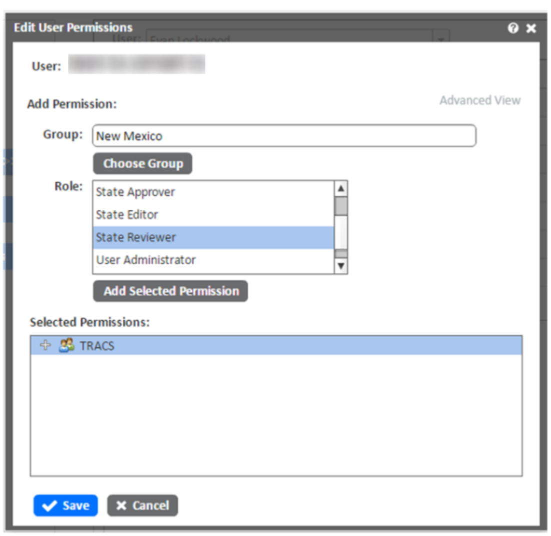


4. To edit the user's profile information click **Edit Profile**, make any necessary changes and click Save. (Note: Users can manage their own profiles through the Profile button on the Dashboard).

5. To edit their permissions, click **Edit Permissions**. On the Edit User Permissions window, click Choose Group. The Choose Group window will open. Select the plus sign (+) next to TRACS and each sub-menu to find and select the correct group. Then click **Done**.



6. Then select the role to assign to the user for that group and click **Add Selected Permission**. Add any other permissions needed, then click **Save**.
    - Click the Advanced View link if the requesting user requires access to a group outside his/her regional/state jurisdiction for a specific task.

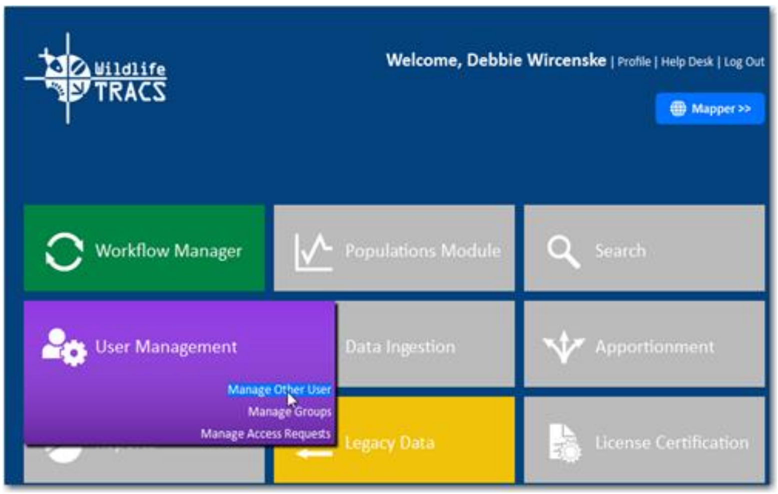


Disable a User Account

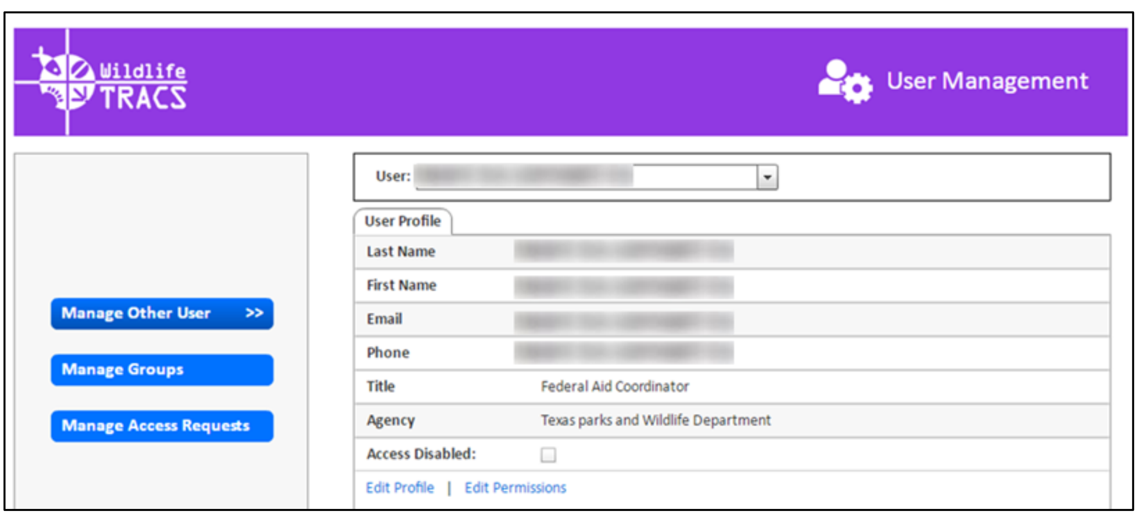
User Administrators are responsible for deactivating end-user accounts when access is no longer needed.

A user account that has been disabled can be reactivated by the User Administrator using the Manager Other User tool. The deactivated user does not need to submit a new access request.

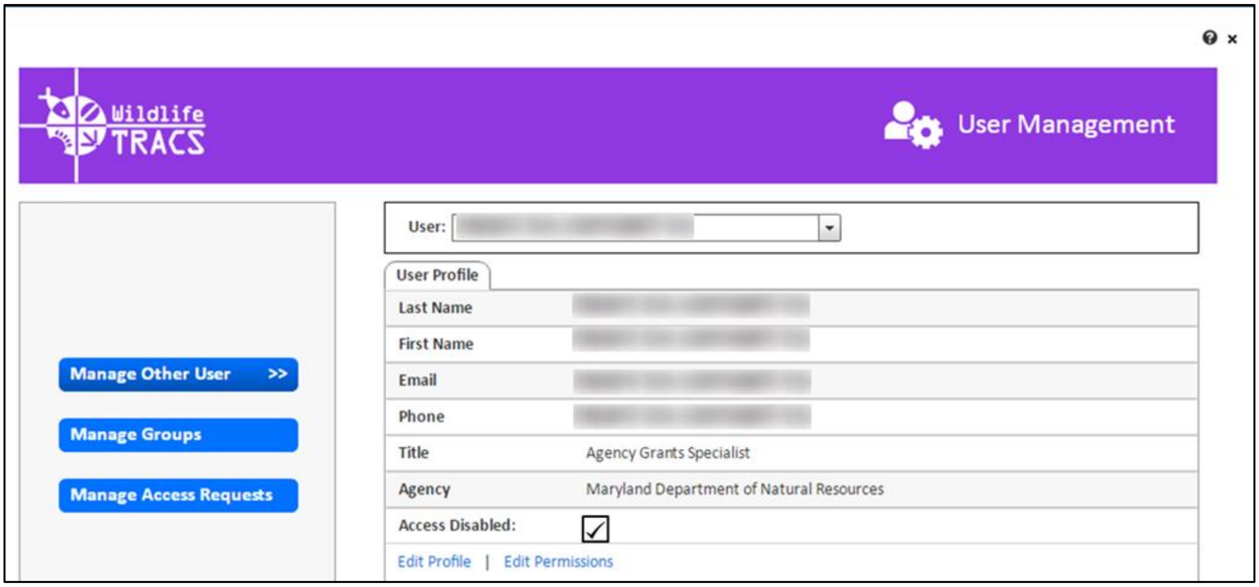
1. Select **Manage Other User** from the **User Management** module.



2. Type in first three letters of the user's first or last name. Select the applicable user from the drop down list. Click the **Edit Profile** link.



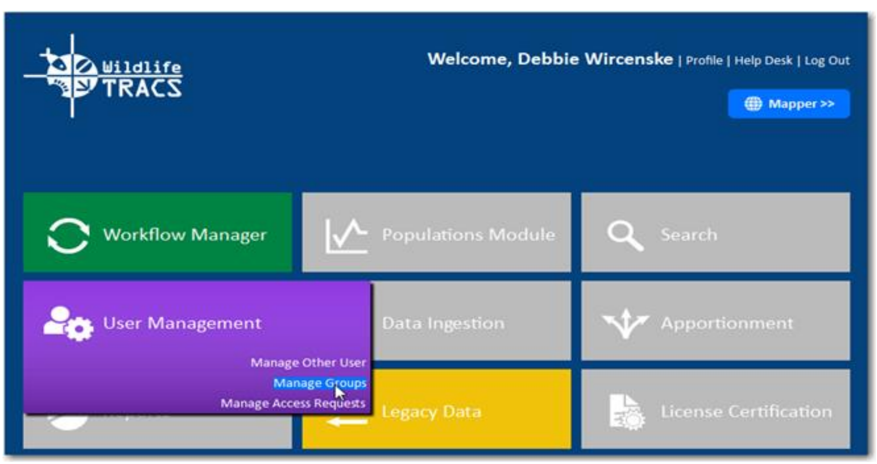
3. Check the **Access Disabled** box located below the **Agency** field. Click the **Save** button.



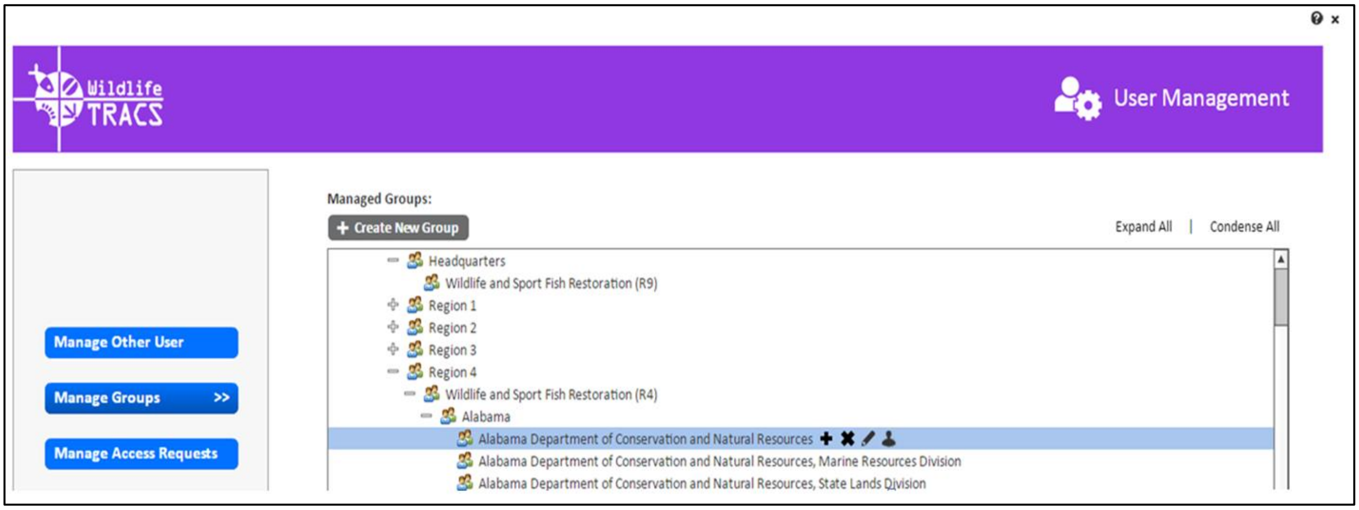
User Groups and Subgroups

Groups refer to an agency, division or regional office that has specific permissions with TRACS (e.g. Region 1, Hawaii Department of Natural Resources). Sub groups are departments or divisions within an agency (e.g. Division of Aquatic Education, Department of Wildlife etc.). Groups are hierarchical with a parent-child relationship and are displayed in a tree structure within each parent group. Users from a parent group will have "inherited permissions" to all child groups.

1. From the Dashboard, click on **User Management** to view a nested sub-menu to the right. Select **Manage Groups**.



2. The Manage Groups window opens. To view information about existing groups, click on the plus sign (+) next to TRACS and each sub-menu below it. (Tip: Use the buttons on the top right to **Expand All** or **Condense All**)



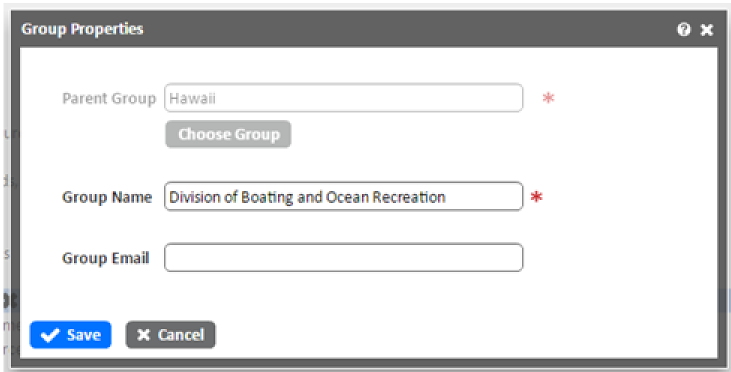
- When a group is selected, buttons will appear to the right.
  - Click the plus sign to create a new child group (or click on Create New Group at the top of the window).
  - Click the X icon to delete a group (note: you will not be able to delete a group that has projects or users associated with it.)
  - Click the pencil icon to edit the group information.
  - Click on the person icon to view a list of users belonging to that group.

<u>To create a new group or sub-group:</u>

Select Create New Group at the top of the window or click on the plus sign next to a group in the table.

The Create A New Group window will open.

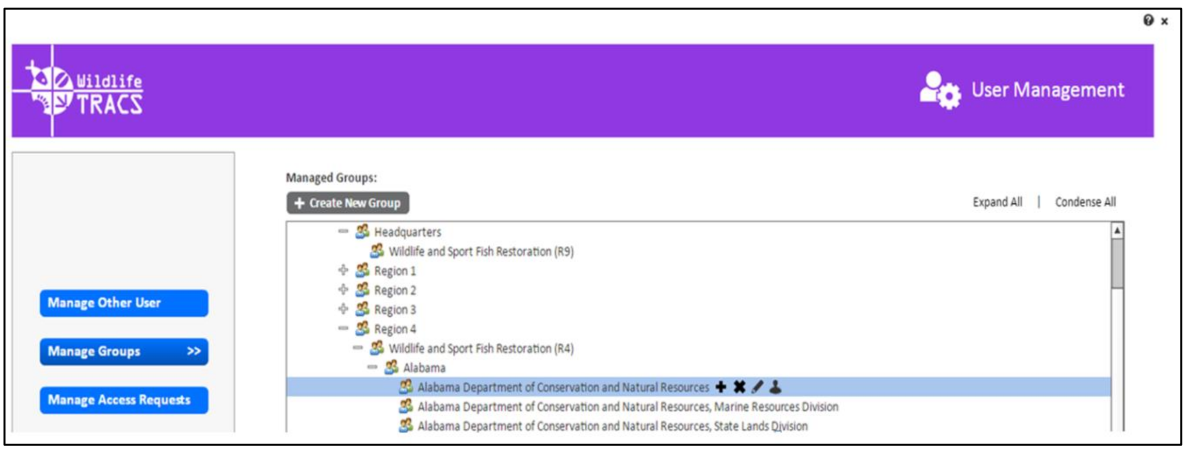
- Select Choose Group and click the + sign to expand sub-menus to select the Parent Groups (e.g. Hawaii)
- Type in the Group Name (e.g. Division of Boating and Ocean Recreation)
- Group email should be left blank (may be used for automated notifications in the future)
- Click the Save button



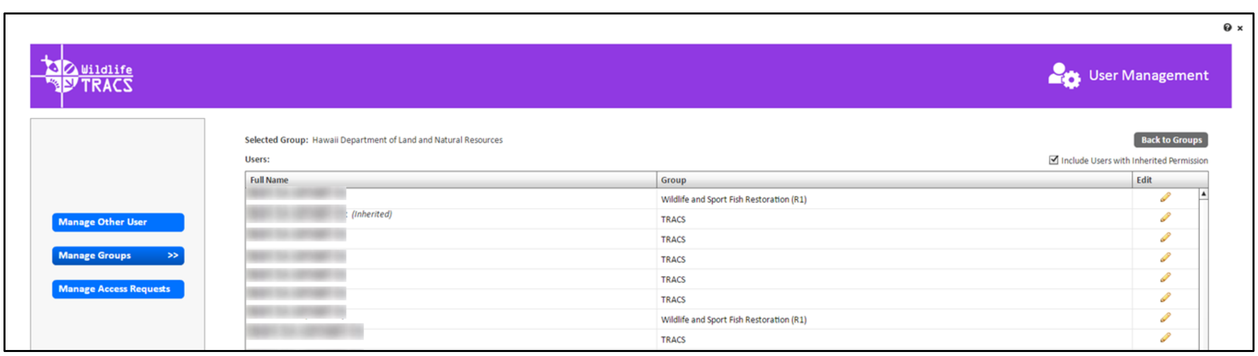
To view a list of users in a group or sub-group:

To view information about existing groups, click on the plus sign (+) next to TRACS and each sub-menu below it. (Tip: Use the buttons on the top right to **Expand All** or **Condense All**).

Then click on the person icon to view a list of users in that group.



A list of users belonging to that group will be displayed. Check the box in the upper right to include users with inherited permissions (inherited will display after their name). Click the pencil icon in the Edit Column to edit that user's profile or permissions.



Delete a User Group

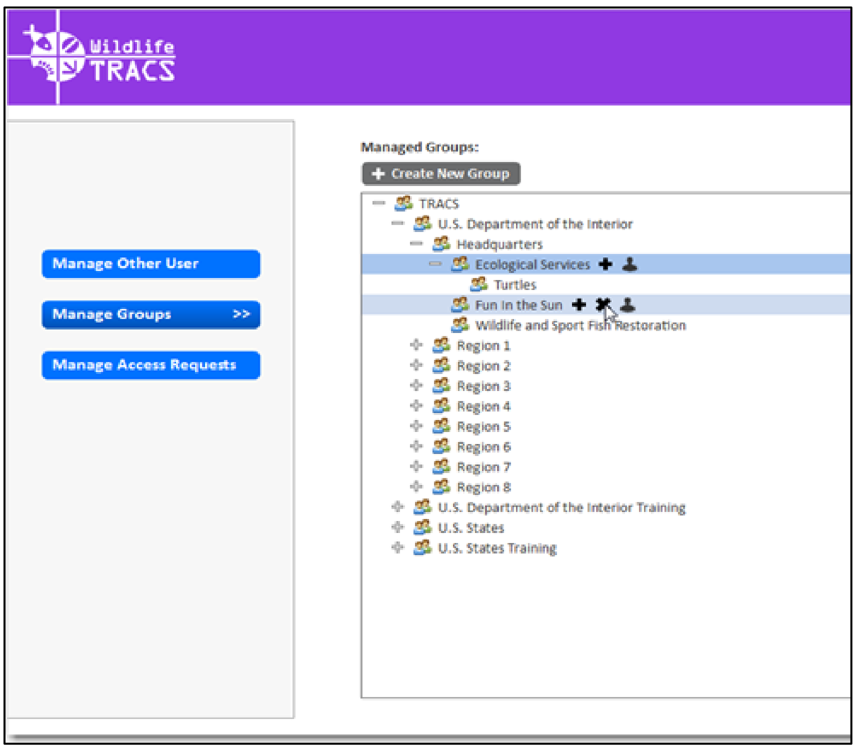
A group can be deleted by a User Administrator; however, a group cannot be deleted if user(s) are assigned to the group.

Select the **Manage Group** submenu from the **User Management** module in the TRACS Dashboard.

Select **Manage Other Users**.

Click the (+) sign to open all applicable groups and subgroups.

Click the delete symbol (X) located to the right of the group and or subgroup to delete the group.



The Delete Group warning message will appear. Click **Delete** to confirm.